Senior High School

TEACHER RESOURCE MANUAL

Office Procedures 20-30

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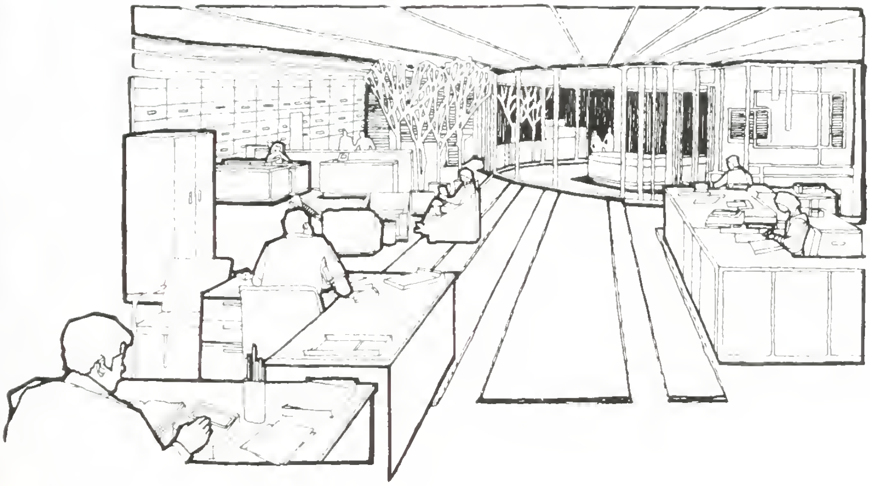

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Preface

The purpose of this manual is to help teachers meet the objectives of the revised Office Procedures 20-30 curriculum. It is intended to:

a. clarify the terms used and expectations outlined in the "Topics" and "Learning Tasks" sections of the curriculum guide,

b. help with long-range and short-range planning by suggesting how to select the modules and sequence the topics within those modules,

c. review practices which encourage effective and efficient use of learning resources and laboratory facilities,

d. recommend methods of evaluating student achievement,

e. suggest alternative teaching strategies, and

f. identify topics that may be sensitive with regard to tolerance and understanding issues, and suggest appropriate strategies for dealing with such topics.

This publication is a service document, which is not mandatory in any way. The suggestions provided are based on the practices of successful and experienced business educators in Alberta. Since no document of this type can address all of the unique situations in schools across the province, teachers should use only those suggestions which appear appropriate for their educational environment.

This manual is unbound and punched for 3-ring binders which will allow teachers to add personal references and/or notes, or move the "Teaching Suggestions" section next to the specific module from the curriculum guide. In addition, this format will make it possible to update the materials as necessary.

Acknowledgements

This manual has been developed for Alberta Education by Rhoda Cucheran, M.E. LaZerte Composite High School, Edmonton; and Marie Tauber, Queen Elizabeth Composite High School, Edmonton. The suggestions contained herein are the result of many years of successful experience in teaching business and office procedures. We appreciate their generous sharing of expertise and resource materials.

As well, many of the projects and suggestions included in the manual have evolved through discussions and materials shared among colleagues and business contacts. The authors wish to recognize this assistance and express appreciation for their contribution.

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OFFICE PROCEDURES 20-30

Introduction

Office Procedures provides students with the opportunity to study the structure, procedures, and technology common to modern Canadian business offices. A major focus of the course is the integration of skills, procedures, and attitudes within an environment that simulates a modern office. The Office Procedures 20-30 program encourages the development of vocational-level competencies suitable for students interested in clerical or secretarial occupations.

Objectives

The student will:

1. Examine the organization, functions, and procedures common to a business office.

2. Examine the various career paths, benefits, and responsibilities of the personnel within the business office.

3. Become familiar with the various methods of communication used in a modern business office.

4. Apply the current procedures for the storage, retention, reproduction, and retrieval of recorded information.

5. Examine the routines related to the processing of words and data through the study of procedures, equipment, and personnel.

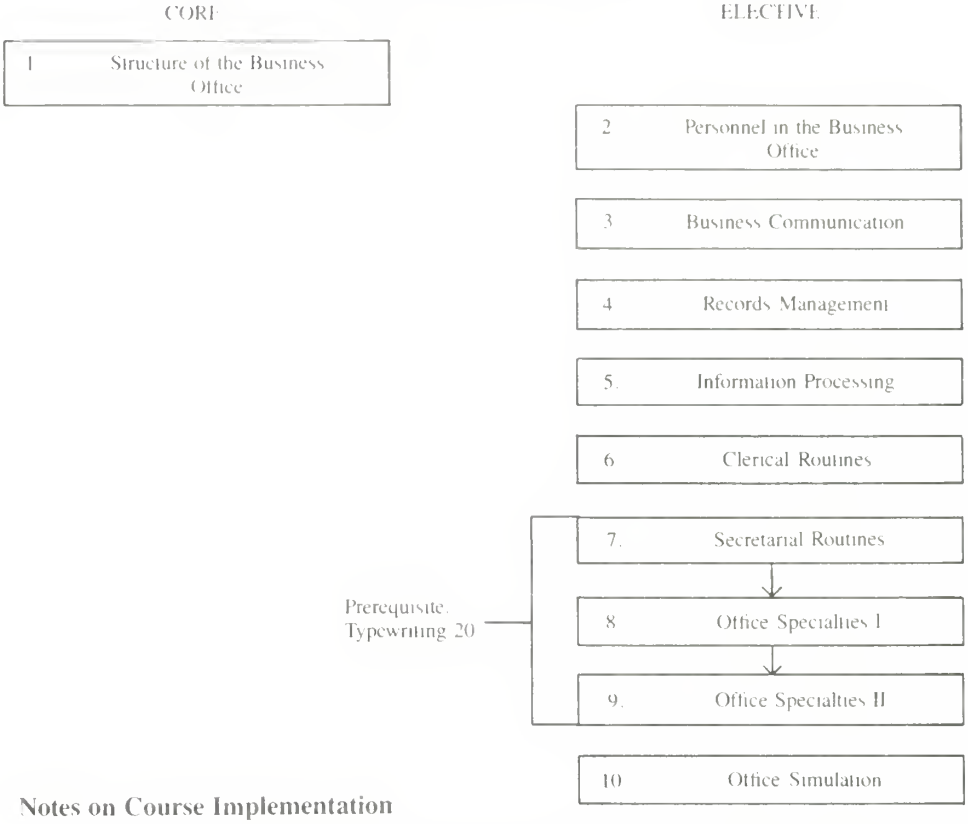
6. Demonstrate the clerical routines that support the efficient handling of goods and services in the modern office.

7. Demonstrate efficient secretarial skills and procedures that support the activities of management.

8. Practise the terminology, documentation, and procedures prevalent in a selected secretarial specialization.

9. Integrate the basic skills, specialized knowledge, and human relations skills developed throughout the business program, within a simulated or in an actual business environment.

FLOWCHART OF MODULES
OFFICE PROCEDURES



Notes on Course Implementation

The office procedures subject strand identifies 10 modules, 1 core and 9 elective. The core module is prerequisite to the elective modules. The elective modules are not sequential, although modules 7, 8 and 9 are recommended for 30-level courses.

Modules 1 to 5 are particularly suitable for a program designed for students interested in general (clerical) office occupations which do not emphasize secretarial routines. Module 10 could be included to support either clerical or secretarial-oriented courses.

Modules 7, 8 and 9 require Typewriting 20 as a prerequisite and should be taught in a classroom equipped with electric/electronic typewriters or machines with text editing capability. Courses offered at the 30 level should expand basic skills and concepts and require students to demonstrate a skill level that reflects business standards.

Courses may be developed for Office Procedures 20 and 30 in modular groups of 3 or 5 to a maximum of 10 credits. Modules from the "Optional" column which are recommended for use within Office Procedures 20 and/or 30 are:

Module No. 8. Business Communication – Practice
9. Business Communication – Integration
11. Goal Setting and Career Development
12. Dicta Typing 1
13. Dicta Typing 2
14. Word Processing 1
15. Word Processing 2
16. Business Simulation

Refer to individual modules for further information regarding equipment requirements or prerequisites.

Integration of Work

It is recommended that the work study component of work experience be integrated into the office procedures program. Also, the work experience program could be planned in conjunction with Office Procedures 30.

PLANNING

PLANNING

LONG-RANGE PLANNING

The Office Procedures subject strand is composed of 10 modules. Modules 1-4 are designed to develop a basic knowledge of procedures common to any business office. Module 1 is core and must be included in the Office Procedures 20 course. Modules 5-8 are designed to develop skills and knowledge appropriate to secretarial or executive assistant careers. Modules 9 and 10 are designed to provide an opportunity to fine tune skills within a realistic work environment. Credit in Office Procedures 20 and Typewriting 20 must be obtained prior to entering Office Procedures 30.

The modules may be covered in a number of sequences; and at either level, depending on the school's facilities, resources, available supplies, and the particular make-up of the class.

Office Procedures is a subject strand which supports vocational career goals. Office Procedures 20 can be designed to provide an orientation to procedures used in an office that emphasize clerical or junior management activities, as well as secretarial. It has been revised to meet the needs and interests of young men and women. Office Procedures 30 is designed to refine and integrate skills developed in Office Procedures 20 that are suitable for secretarial or administrative assistant careers. To take full advantage of the limited credit time available, careful selection and sequencing of modules is essential. Following are the basic guidelines for implementing the courses.

Courses may be designed for three or five credits at either the 20- or 30-level. If two 5-credit courses are planned, modules from the Optional strand will need to be included. Dicta Typing, Word Processing, Business Simulation, Business Communication, and Goal Setting and Career Development modules are particularly suitable.

Planning decisions will need to address the following issues:

a. How many credits (modules) are to be offered at each grade level (3 or 5)?

b. How will the Office Procedures courses support other business courses offered in the school?

c. If Office Procedures is offered with computer support, how will the skills taught in other computer-based programs be reinforced or reviewed?

d. How are the modules that are selected organized within the course?

(Note that once the modules are selected, they need not be taught in sequential order. Moreover, the content of a module can be reordered within that module or integrated into other modules; integrating the content throughout the year is often used for those modules which are mainly theory-based.)

e. Which modules from the Optional strand will be used to enhance the Office Procedures strand?

As limited credit time is available for option courses, many schools cannot offer 10 credits in Office Procedures. A frequent combination is to schedule Office Procedures 20 (3 credits) with Office Procedures 30 (3 credits).

INTEGRATING OFFICE PROCEDURES WITHIN THE BUSINESS EDUCATION PROGRAM

Effective timetabling and scheduling will reinforce the vocational goals of Office Procedures. For example, students should be counselled and be able to select courses that, in combination, will build a relatively sophisticated level of knowledge in procedures, expertise in applying these procedures and skill in utilizing equipment.

The following courses are complementary to the objectives of the Office Procedures 20-30 program:

Computer Processing 10 or 20 (software emphasis) could show students how to use the word processing, data base and electronic spreadsheet software packages that should be integrated into the office procedures courses as applications.

Typewriting 10-20 develops basic keyboarding skills to a vocational level and teaches the basic format rules for preparing letters, reports, tabulations, and business forms; Typewriting 30 builds speed and efficiency in producing the various typewriting applications; Office Procedures 30 utilizes the typewriting skills to simulate an office working environment.

Word Processing 30, or the two individual modules, is designed to build skills in using word processing software and equipment. This might involve students using dedicated word processing equipment and/or learning the advanced functions of a word processing package or an alternative word processing system. If Word Processing 30 is not offered as a course, the individual modules can be included in Office Procedures 20 or 30 or Typewriting 20 or 30.

Shorthand 20-30 develops notetaking skills which are suitable for such office activities as taking messages, minutes, and making summaries. These skills, when developed to a vocational standard, should be reinforced within the Office Procedures 30 course.

Dicta Typing 20, or the two individual modules, is designed to build skills in using dictation and transcription equipment. This equipment is used for input and output of information in offices. In addition, transcribing the spoken word to the written reinforces the correct use of language mechanics. If Dicta Typing 20 is not offered as a course, the individual modules can be included in Office Procedures 20 or 30, Typewriting 20 or 30, or Shorthand 30.

Business Communication 20, or the three individual modules, is designed to build written and spoken communication skills as applied within a business context. These skills are important in future management or secretarial careers. If Business Communication 20 is not offered as a course, the individual modules can be included in Office Procedures 20 or 30, or Shorthand 20 or 30.

As access to credit time is limited, the scope of the business education program which can be made available to students may be expanded by:

1. rotating courses over a 2- or 3-year cycle.

2. combining related 3-credit courses.

3. including modules from the Optional strand.

For example, the following 3-credit courses can be combined effectively:

Office Procedures 20 (3 credits)
Business Communication 20 (3 credits)

Office Procedures 20 (3 credits)
Shorthand 20 (3 credits - "Note taking")

Office Procedures 20 (3 credits)
Computer Processing 20 (3 credits - software focus)

Many other combinations will provide effective instruction in basic office skills.

Similarly, course combinations at the senior high level allow students to apply skills learned in a number of courses and refines them to a job-entry level. For example:

Office Procedures 30 (5 credits)
Work Experience 30 (5 credits)

(scheduled in morning or afternoon block)

Office Procedures 30 (3 credits)
Shorthand 30 (3 credits)

Office Procedures 30 (3 credits)
Word Processing 30 (3 credits)

The Planning Worksheets, included in the Business Education Manual for Administrators, Counsellors, and Teachers, may also assist in selecting modules.

ALTERNATIVES FOR SELECTING MODULES

The scope of the program is a function of the number of credits that are available. Following are some alternatives for program planning for a student who wishes to prepare for a secretarial career or a career in junior management:

10 Credit Sequence — OP 20 (5), OP 30 (5)

OP 20 (clerical emphasis) — Modules

- 5 credits

Module
1. Structure of the Business Office
3. Business Communication
4. Records Management
6. Clerical Routines

Optional (Select one of the following):

- OP 10 Business Simulation
- BE 8 Business Communication - Practice
- BE 12 Dicta Typing 1
- BE 14 Word Processing 1

OP 30 (secretarial emphasis) — Modules

- 5 credits

Module
2. Personnel in the Business Office
5. Information Processing
7. Secretarial Routines
8. Office Specialties I

Optional (Select one of the following):

- OP 10 Business Simulation
- BE 9 Business Communication - Integration
- BE 13 Dicta Typing 2
- BE 15 Word Processing 2

8 Credit Sequence — OP 20 (3), OP 30 (5)

OP 20 (clerical emphasis) — Modules

- 3 credits
- used as back-up to 3-credit courses (i.e., Business Calculations 20, Marketing 20, and/or Basic Business 20).

Module
1. Structure of the Business Office
4. Records Management
6. Clerical Routines

OP 30 (secretarial emphasis) Modules

- 5 credits
- used as refinement, integration with skill courses (i.e., Typewriting 20-30, Shorthand 30, Word Processing 30 and/or Dicta Typing 20).

Module 2. Personnel in the Business Office
3. Business Communication
5. Information Processing
7. Secretarial Routines
8 or 9. Office Specialties

6 Credit Sequence OP 20 (3), OP 30 (3)

OP 20 / OP 30 (secretarial emphasis) Modules

Module 1. Structure of the Business Office
3. Business Communication
4. Records Management
5. Information Processing
7. Secretarial Routines
8 or 9. Office Specialties

NOTE: In a semestered, four-period-a-day program, Work Experience can be scheduled in conjunction with Office Procedures 30. These two courses, totaling 250 hours, can be organized to allow students to spend a half-day in offices at one or more locations. This allows students to integrate their experiences more fully.

	50 hrs.	50 hrs.	50 hrs.	75 hrs.	25 hrs.
Period 1	OP Class	Work Station	OP Class	Work Station	OP Class
Period 2		(1)		(2)	

GUIDELINES FOR COURSE PLANNING

1. Select modules carefully, dependent upon the type of equipment and the materials you have available to you.

2. Research the community for leads and contacts as to the best possible field trips and guest speakers available, and their willingness to cooperate.

   If a field trip is planned, the teacher must choose the site carefully and meet with the contact prior to the visit in order to establish:

   a. which areas the students may visit.

   b. if there will be tour guides.

   c. which types of information they may look at (e.g., office manuals).

   d. which areas or questions are sensitive and should not be explored (e.g., salaries, interpersonal relationships, informal lines of authority, problem-solving).

   e. basic information about the company which students should be aware of prior to the visit (e.g., what the company does, location, size, product or service information if applicable).

   A question or guideline sheet should be given to students and discussed prior to the trip in order to provide a focus for the students and to prepare them well. (See page 105 for a sample guidelines for field trip report.)

3. Select basic modules for Office Procedures 20 that provide students with the basics in: Filing/Records Management; Basic Grammar and Communication Applications; some knowledge of the different types of office positions, and their duties. It is recommended that students be provided with the opportunity for hands-on applications for individual positions.

4. Once students become familiar with a specific position, or two, it is suggested that they be exposed to the "work flow" of an office by involving them in a group simulation that incorporates their "field of expertise", and shows how each position is dependent upon others in order to do a complete job.

5. At the senior level, students should be encouraged to be more involved in their learning experience through taking on responsibilities for researching and presenting specific interest topics to the rest of the class (oral communication and research skills). They should also be encouraged to demonstrate equipment, and procedures to others (training skills).

6. Besides demonstrating initiative, as in 5. above, students at the senior level should participate in WORK STUDY sessions to gain real on-the-job experience.

7. While continuing to develop their basic skills, students should be encouraged to explore areas of specific interest to them, through applications involving materials related to their career objectives (e.g., individual kits such as medical or legal office procedures). They should also participate in a group simulation that involves decision-making, composition, and interpersonal relations with co-workers and others.

8. As a department, develop a course sheet outlining what will be covered, objectives and evaluation procedures. This sheet is to be given to students at the beginning of the year. If the course will operate on the rotation system, students should be given a copy of the rotation. (See page 14 for an example of a course outline for Office Procedures 30.)

9. Decide how the course will flow. Will the whole class be involved in the same unit at the same time? Some teachers may find it necessary to have students work as groups through a rotation plan -- particularly where the number of machines is limited. As a minimum, four text-editing machines are required for an Office Procedures classroom.

10. If a rotation plan is needed, several considerations are important. Will all the groups be in the classroom or will some have to locate elsewhere? Which units require a lot of teacher involvement? Which units can be organized so that minimal teacher participation is needed? These should be planned carefully so there is a good mix of types according to teacher help needed. If the rotation plan is used, it may help if the teacher appoints a group manager who is responsible for maintaining attendance records (which the teacher verifies), collecting all necessary papers at the beginning and end of each class, meeting speakers, and informing the teacher of any difficulties the teacher may not immediately notice. (See page 17 for an example of a class rotation chart.)

11. Plan the placement of modules and/or topics according to the calendar year. Use the "Course-at-a-Glance" sheet. Fill in any important dates like professional development days, holidays, examination weeks, etc. Then decide which topics can be placed where. Provide a good mix of types of activities. Record immediately any speakers who are booked, any field trips which are planned, work study stations. Provide students with the same sheet and give them information when it is confirmed. For example, this sheet may be filled in with the class two weeks at a time. See pages 19-20 for an example of long-range planning for Office Procedures 20 and 30. A blank course planning form which could be used by teachers and students is also included on page 21.

12. All courses should include an information sheet which outlines the course routines. Provide students with copies of specific grading charts for each unit. Refer to page 22 for an example of a student information sheet, daily routines and grading.

13. Consider having students prepare a procedures manual which is developed throughout the course. Sample guidelines for preparation of such a manual are shown on page 23.

14. Modules may be integrated to provide change and for integration of concepts or applications.

EXAMPLE OF COURSE OUTLINE
FOR OFFICE PROCEDURES 30

(This would be given to students at the beginning of the course, and filed in the school office.)

Business Ed. Dept. Office Procedures 30 R. Cucheran

Prerequisites = 50% in Office Procedures 20
50% in Typewriting 30

Purpose:

1. To enable students to understand the routine-related processing of information through the study of procedures, equipment and people. (OP. Mod. 5)

2. To provide students with the opportunity to understand and develop skills in the secretarial routines that support the activities of management. (OP. Mod. 7)

3. To acquaint students with tasks and attitudes consistent with the terminology, documentation, and procedures prevalent in a selected secretarial specialization, and to encourage the integration of skills. (OP. Mod. 8)

4. To integrate communication skills with career demands applicable to the business environment. (OP. Mod. 3)

5. To study various strategies relating to goal setting and goal attainment and to develop personal goal-oriented techniques for career development in the business world. (OP. Mod. 11)

Text: Office Systems and Procedures

Supplementary: On the Job - Simulations 1, 2

Students will spend approximately 25 hours on the word processing equipment.

TIPS FOR COURSE PLANNING

1. Select one or two days each week when students may wear "office clothes".

2. Students host speakers, introducing them to the class and writing thank you letters.

3. All work presented in typed form should be mailable.

4. Bulletin board assignments could be spread throughout the course: students do them in pairs; receive a mark for originality, attractiveness, etc.

5. Students should do self-evaluation.

6. Teaching methods should vary.

7. Classroom should assume the image of a typical business office.

8. Students should answer phone and greet visitors.

9. When absent due to illness, students should phone in and give you a message to this effect.

10. Maintain a magazine rack with brochures, leaflets and magazines.

11. Collect class set of year-old phone books.

12. Subscribe to as many magazines and associations as possible.

13. Always have students well prepared for field trips. They should each have a question sheet outlining the specifics of the trip. Always wear office dress when on field trips.

14. Comprehensive mid-term or final exams are not usually recommended.

15. Provide for a variety of software where applicable.

16. The integrity of any software agreements should be maintained.

17. When students use any software disks, keep a sign-out, sign-in inventory list.

18. Each module should be planned to accommodate roughly 25 hours of classroom time.

19. Where possible, have students compose written work. Also, have students give oral presentations to increase their confidence and ability in speaking.

20. Prepare all the forms you will be using in the course, and have sufficient numbers duplicated ahead of time! Set up a file for MASTERS.

21. Book all films and filmstrips, etc., for the dates you plan to use them. Record this booking information for the next time, along with your reactions, evaluation of the film.

22. When preparing daily teaching plans, be flexible and allow room for possible changes.

23. Purchase class sets of workbooks. To save money, do not permit students to write in them; use them for several classes, over several terms.

24. Purchase software that will allow you to create files of test questions so that you are not continually having to write tests. Questions and answers can be changed or rotated when necessary. Randomly selected questions can be pulled to make up a test, or test questions can be put in random order as a review test.

25. Send for sample materials from vendors, publishers, and publications. Most office magazines contain a form for the reader to complete to request more information on a product. This allows the teacher to keep up-to-date classroom materials.

26. Prepare audiotapes of your lectures for student review purposes, or for students who miss a lecture. If possible, create colored videotapes of presentations, and use overheads, pictures. Have vendors bring in and demonstrate equipment, etc. Having material on video guarantees the same quality in succeeding presentations. The video can be followed with personal comments by the teacher regarding current trends, changes, or points to be emphasized.

27. Prepare guidelines for procedures manuals, distribute, and go over these with students so they are aware of what is expected of them. Be specific as to formatting so manuals are neat and uniform.

28. Keep in hand several activities that could be assigned to the class in the event you are absent or suddenly called away.

29. Keep a file of bonus jobs to which students can have access in the event they finish their work early.

30. Have students prepare tapes suitable for use on transcription machines.

31. Search out ads in office magazines offering free samples and write for them.

32. Keep a file of letters or memos you or the department receives. Laminate them. Prepare a display or have students compare and contrast styles.

33. Go for lunch together during Secretary's Week.

EXAMPLE OF ROTATION CHART

It may be necessary for the students to work in shifts because of equipment limitations (i.e., 25 students in the class with access to only 5 microcomputers). In this situation, the class would have to be divided into groups so that the students spend the required class time on the microcomputer.

	Feb.	March	April	May	June
Module A	Groups 2,3,4,5			Group 1	
Module B	Group 1	Group 2	Group 3	Group 4	Group 5
Module C		Groups 3,5	Groups 2,1,4		
Module D			Group 5		Groups 1,2,3,4
Module E		Groups 1,4		Groups 2,3,5	

Times would vary so as to make each section approximately even.

To use a rotation plan (such as that given above), successfully a number of considerations need to be taken into account.

1. Each group should have a "manager" who is responsible for handing out paper, collecting resources, etc., as needed by the group. This manager may rotate with each module.

2. If three different modules occupy the same time slot, plan so not all three require "teaching" at the same time. In the example, Module E could be work study. Also, it helps to have students do some work on their own.

3. Prepare an outline so students know the flow of activities. This outline should also indicate deadlines. Less responsible students can use the outline as a benchmark for their progress within the unit.

4. It is important to plan modules effectively, so that minimal daily participation by the teacher is required. Remember, you can only instruct one group at a time.

5. Have students hand in all work from the module at the end of the section. Students should see their graded work but the teacher should retain their assignments until all members of the class have completed the particular module. This avoids students having access to one another's finished work.

6. If possible, do not split the class into group rotation right away. The first few weeks are valuable training and information times. The students get to know the teacher, the levels of expectation and vice versa. This is especially important if the teacher does not know the students from previous classes, or grades.

7. Assign the groups at random. This allows students to learn to work with new people and avoids the clustering of friends.

Following are a number of examples of long- and short-range plans. Page 19 is a long-range plan for Office Procedures 20 (5 credits) and page 20 for Office Procedures 30 (5 credits). The modules selected are:

Office Procedures 20	Office Procedures 30
Module 1. Structure of the Business Office	Module 2. Personnel in the Business Office
Module 3. Business Communication	Module 5. Information Processing
Module 4. Records Management	Module 7. Secretarial Routines
Module 6. Clerical Routines	Module 8. Office Specialties I
Module 10. Office Simulation	Module 9. Office Specialties II

In order to fit five 25-hour modules into each course, these sample outlines are "LOADED" and teachers must remember to consider time taken away from class for holidays and other functions when drawing up their own plans.

Some flexibility must also be built into the program to allow for projects, exercises, field trips, films, etc., that may take up more time than anticipated. Some materials may cover more than one task or topic and, in so doing, will require a longer time period to cover the content.

Page 27 is an example of a plan to teach a learning task in Module 4: Records Management. Pages 25-26, offering some suggestions for planning daily lessons, are examples of daily lesson plans.

EXAMPLE OF LONG-RANGE PLANS

OFFICE PROCEDURES 30 MODULES 2,5,7,8,9,10 (semestered, 80 minutes daily)

WEEK OF	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	M5 – Information Processing (Historical Overview)	M5 – (HANDS-ON PROJECT)	M5 – Concepts Terminology (GLOSSARY PROJECT)	M5 – Concepts Organization	M5 – (FIELD TRIP/PROJECT)
2	M5 – Concepts Equipment	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Input	M5 – Concepts (HANDS-ON EXERCISES)	M5 – Concepts Proofreading
3	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Editing	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Storage	M5 – (HANDS-ON EXERCISES)
4	M5 – Concepts Reproduction	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Distribution	M5 – (HANDS-ON EXERCISES)	M5 – QUIZ
5	M2 – Job Descriptions (OVERVIEW)	M2 – Job Descriptions (SPEAKER)	M2 – (PROJECT)	M2 – Lines of Authority	M2 – Business Ethics
6	M7 – Authority & Ethics (CASE STUDY/ROLE PLAY)	M2 – (Cont'd)	M2 – Attitudes & Human Relations	M2 – (FILM/CASE STUDY ROLE PLAY/EXERCISE)	M2 – (Cont'd)
7	M7 – Sources of INFORMATION (OVERVIEW) *	M7 – (EXERCISES)	M7 – Formatting	M7 – (EXERCISES)	M7 – Business Meetings
8	M7 – Listening Skills	M7 – (CASE STUDIES/ROLE PLAY)	M7 – Production Measurement	M7 – Executive Travel Arrangements	M7 – Business Meetings
9	M7 – Financial Management	M7 – (RESEARCH PROJECT FOR ORAL PRESENTATIONS)	M7 – (Cont'd)	M7 – (Cont'd)	M7 – Business Meetings
10	M10 – WORK STUDY – ALL DAY FOR ONE FULL WEEK	M10	M10 – (Cont'd)	M10 – (Cont'd)	M10 – (Cont'd)
11	M8 – Office Specialties INDIVIDUAL KITS	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
12	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
13	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
14	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
15	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
16	M2 – Career Preparation (OVERVIEW)	M2 – Student Self-Evaluation for Career Selection	M2 – Job Selection	M2 – Career Kit (COMPOSITION)	M7 – Business Meetings
17	M2 – Career Kit (COMPOSITION)	M2 – (Cont'd)	M2 – (Cont'd)	M2 – (Cont'd)	M7 – Business Meetings
18	M2 – INTERVIEWS FOR EMPLOYMENT (SIMULATED SITUATIONS, BASED ON CAREER KIT INFORMATION)	M2 –	M2 –	M2 –	M7 – Business Meetings
19	M2 – (Cont'd) PREFERABLY VIDEO-TAPED and PLAYED BACK FOR STUDENT AWARENESS				
20	*Most Module 8 Office Specialties (individual packets) take up to 50 hours to complete, therefore it may be necessary to spend part of the classes on M8 as early as the 7th week, in conjunction with M7 activities.				

EXAMPLE OF LONG-RANGE PLANS

OFFICE PROCEDURES 30 MODULES 2,5,7,8,9/10 (semestered, 80 minutes daily)

WEEK OF	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1	M5 – Information Processing (Historical Overview)	M5 – (HANDS-ON PROJECT)	M5 – Concepts Terminology (GLOSSARY PROJECT)	M5 – Concepts Organization	M5 – (FIELD TRIP/PROJECT)
2	M5 – Concepts Equipment	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Input	M5 – Concepts (HANDS-ON EXERCISES)	M5 – Concepts Proofreading
3	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Editing	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Storage	M5 – (HANDS-ON EXERCISES)
4	M5 – Concepts Reproduction	M5 – (HANDS-ON EXERCISES)	M5 – Concepts Distribution	M5 – (HANDS-ON EXERCISES)	M5 – QUIZ
5	M2 – Job Descriptions (OVERVIEW)	M2 – Job Descriptions (SPEAKER)	M2 – (PROJECT)	M2 – Lines of Authority	M2 – Business Ethics
6	M7 – Authority & Ethics (CASE STUDY/ROLE PLAY)	M2 – (Cont'd)	M2 – Attitudes & Human Relations	M2 – (FILM/CASE STUDY ROLE PLAY/EXERCISE)	M2 – (Cont'd)
7	M7 – Sources of INFORMATION (OVERVIEW) *	M7 – (EXERCISES)	M7 – Formatting	M7 – (EXERCISES)	M7 – Business Meetings
8	M7 – Listening Skills	M7 – (CASE STUDIES/ROLE PLAY)	M7 – Production Measurement	M7 – Executive Travel Arrangements	M7 – Business Meetings
9	M7 – Financial Management	M7 – (RESEARCH PROJECT FOR ORAL PRESENTATIONS)	M7 – (Cont'd)	M7 – (Cont'd)	M7 – Business Meetings
10	M10 – WORK STUDY – ALL DAY FOR	M10 ONE FULL WEEK	M10 – (Cont'd)	M10 – (Cont'd)	M10 – (Cont'd)
11	M8 – Office Specialties INDIVIDUAL KITS	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
12	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
13	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
14	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
15	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M8 – (Cont'd)	M7 – Business Meetings
16	M2 – Career Preparation (OVERVIEW)	M2 – Student Self-Evaluation for Career Selection	M2 – Job Selection	M2 – Career Kit (COMPOSITION)	M7 – Business Meetings
17	M2 – Career Kit (COMPOSITION)	M2 – (Cont'd)	M2 – (Cont'd)	M2 – (Cont'd)	M7 – Business Meetings
18	M2 – INTERVIEWS FOR EMPLOYMENT	M2 – (SIMULATED SITUATIONS,	M2 – BASED ON CAREER KIT	M2 – INFORMATION)	M7 – Business Meetings
19	M2 – (Cont'd) PREFERABLY	VIDEO-TAPED and	PLAYED BACK FOR	STUDENT AWARENESS	
20	*Most Module 8 Office Specialties (individual packets) take up to 50 hours to complete, therefore it may be necessary to spend part of the classes on M8 as early as the 7th week, in conjunction with M7 activities.				

COURSE-AT-A-GLANCE WORKSHEET

LONG-RANGE PLANNING FOR ____

WEEK OF	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
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20					

EXAMPLE OF STUDENT INFORMATION SHEET

DAILY ROUTINES AND GRADING: OFFICE PROCEDURES 30

PRETESTING:	Business English #1 - Inventory of Business English Skills Typewriting - Two five-minute timings and a production test from rough draft.
TIME CARD PUNCH IN:	Sign in daily. Record any absences from the classroom. Remember to sign out at the end of the day and to record the daily production count.
DAILY ROUTINE:	First 15 minutes every day should be spent on Drill Books - Spelling and Grammar drills. Work must be handed in at the end of the 15 minutes designated for the drills. (This serves as an attendance and punctuality check as well as a spelling and grammar review.) These materials must be proofread and the number of correct lines counted and recorded daily. Students will take turns filling the position of "Administrative Assistant" to proofread and correct these drills. During their assignment as "AS" they will not be required to do the drills.
MONDAYS & WEDNESDAYS:	Theory - Rules, information, and worksheets will be presented on business English; filing procedures; word processing; telephone techniques; verbal and written communication skills, etc. Students will be required to keep a well-organized notebook which includes notes, handouts, and correct assignments.
THURSDAYS:	Quizzes on the above-noted materials when necessary.
FRIDAYS:	Conference sessions; guest speakers; field trips; other types of activities to be determined by the group in consultation with the instructor.
KITS:	The kits take approximately 50 hours to complete.
CAREER KITS:	The final three weeks of the semester will be used to complete CAREER KITS and to do VIDEO-TAPED INTERVIEWS.

GRADING:

Up to Mid Term		Mid Term to Final	
Daily Exercises (DB)	10%	Daily Exercises (DB)	10%
Quizzes; Worksheets	20%	Quizzes; Worksheets	20%
Notebooks and/or Presentation	20%	Notebooks and/or Presentation	20%
Kits (M/L/G/etc.)	30%	Kits (M/L/G/etc.)	30%
Mid Term Examination	10%	Career Kit & Video-Taped Interview	10%
Log Sheets	10%	Log Sheets	10%
	100%		100%

Course Mark: 1st Term = 40%
2nd Term = 60%

EXAMPLE OF GUIDELINES FOR A PROCEDURES MANUAL

Three-ring binder with dividers and lined paper for note-taking; blank paper for pictures, drawings and typewritten or word processor produced notes.

Sections:

1. Contents.
2. Course outline and guidelines.
3. Concepts (notes and exercises, quizzes and tests).
4. Communication skills (notes, rules, quizzes).
5. List of steps required to do basic text-editing on each type of word processing equipment used.
6. Journal/article summaries and notes from guest speakers; lectures; personal development; films, filmstrips; course evaluations, etc.
7. Research project report or special project.
8. Summaries of kits and projects participated in during the course.
9. General (additional information, pictures, etc., gathered through general reading).
10. Glossary of word processing terms with definitions.

Research Report:	Use forms provided to gather information while on work study.
OR	
Special Project:	Assignment to be completed by students not going out on work study due to other commitments. (See assignment sheet for details.)
Journal Articles:	Typed in double space; approximately three pages minimum. Include name and date of publication being reviewed.
Course Evaluations:	Occur throughout term via assignments, quizzes and tests (module tests and/or final tests). (See assignment sheet for details.)

PREPARING DAILY LESSON PLANS

Prepare detailed plans well enough ahead of time so that all materials required will be ready. These include films, projects, simulations, exercises, papers for copying, articles to show to the class, and anything else that may be required. Example of lesson plans for:

(1) the topic Business Organization and Management, Module 1, is provided on page 26.

(2) the learning task "identify basic file supplies and their use," Module 4, is provided on page 27. A blank lesson plan form is also provided on page 25.

Remember to plan the module for variety, challenge and appropriateness. Some daily routines will be established. For example, if an old time clock is available, students may punch-in each day instead of the teacher recording attendance.

When the lesson is finished, record comments regarding which activities went well, which should be altered or perhaps could be approached another way. When using films, record the name and source of the film, along with time, etc. Record your opinion as to whether or not you should plan for guest speakers or field tests again.

When covering concepts, provide a variety of resources: lectures, reading materials, overheads and any other technique that provides for variety. Students may have to be given instruction in making/taking notes.

DAILY PLAN

COURSE: ______ MODULE: _____ TOPIC: ________________________________

INSTRUCTOR ACTIVITIES:

REVIEW: (TIME: ______)

NEW MATERIAL PRESENTATION: (TIME: ____________)

Preparation	Method of Presentation	Resources

STUDENT ACTIVITIES: (TIME: ____)

READING ASSIGNMENT ____ PROJECT ___ CASE STUDY ____
ROLE PLAY ____ FIELD TRIP ____ GUEST SPEAKER ____ OTHER ____
WORK STUDY ____ RESEARCH ____ QUIZ ____

WRAP-UP: (TIME: ____________)

EVALUATION:

CONCERNS:

EXAMPLE OF A DAILY PLAN (60 minutes)

COURSE: OP20 MODULE: 1 TOPIC: Organization and Management

INSTRUCTOR ACTIVITIES:

REVIEW: (TIME: NONE)

NEW MATERIAL PRESENTATION: (TIME: 20 minutes)

Preparation	Method of Presentation	Resources
Prepared Lecture Overhead Equipment Transparencies or Film & Projector	Lecture-Discussion-Demonstration Emphasize: - What is a business? - How are businesses organized and managed? - What is a: proprietorship? partnership? corporation? private corporation? public corporation? crown corporation?	- The World of Business, Murray, Pub. Wiley (Ch. 1 & 2)

STUDENT ACTIVITIES: (TIME: 30 minutes research, plus 20 minutes feedback)

READING ASSIGNMENT ____ PROJECT X CASE STUDY ____
ROLE PLAY ____ FIELD TRIP ____ GUEST SPEAKER ____ OTHER ____
WORK STUDY ____ RESEARCH ____ QUIZ ____

Small groups - select a business of interest to the group and develop a list of questions that might be asked in order to understand the nature of the business, how it is organized and managed, etc. (If electronic equipment is available, have the list of questions stored in memory.)

Reassemble, and have group representative with the longest list of questions read them to the rest of the class. (If electronic equipment available, have others add any questions they did not have on their list.)

WRAP-UP: (TIME: 10 minutes)

Teacher will summarize, give reasons for the exercise, have students print up, duplicate and keep the list. This would be a good time to start a PROCEDURES MANUAL.

EVALUATION: (Sample Questions)

1. Is this an international, national or local firm?
2. What are its raw material requirements?
3. Who are its suppliers?
4. Who are its customers?
5. How many people does it employ?
6. What type of work is done by employees
7. What education is required at entry-level?
8. What equipment is on-site?
9. Does it have in-company training for employees?
10. What are the career advancement opportunities?

CONCERNS: Record any concerns teacher or students may have.

EXAMPLE OF A LESSON PLAN (40 minutes)

Course: Module 4 - Records Management
Learning Task: Identify Basic File Supplies and Their Use
Objectives: Students will be aware of the variety and use of filing supplies.
Goal for the Day: Describe the use of and show a variety of filing supplies.

****

Time — Activity

5 min. Class organization, attendance, announcements.

2 min. Introduction

Refer to a very "ordinary" file drawer in the room. Pull out a file - "This is but one example of many kinds of file folders." Why is this one type being used?

20 min. Topic (Lecture . Show)

A. File Folders

- sizes - show)
- colors - show)
- tabs (cuts) - show)
- scoring - demonstrate)
- fasteners - show)
- hanging - show)

Students take notes. Teacher puts key items on board in outline form.

B. Guides

- purpose
- show examples
- reason for eyelet
- explain primary and secondary guides

C. File Labels

- give each student a sample of 15-20 folder labels.
  - mention caption (definition)
  - colors
  - suggestions for typing

Drawer Labels:

- why used
- suggestions for preparation (show example from classroom file cabinet)

D. Review

- Have students group around demo file drawer. Point out examples of all items covered.

10 min. Assignment

1. Type out guidelines in enumerated style for preparation of folder labels, p. 292 Luke. Retain in notebook.
2. Prepare typed captions for the labels given out. Give the class a list of names to use. Walk around to check quality of work. Completed labels are to be kept in students' notebooks.
3. Indicate topic for tomorrow's lesson. Clean-up, tidy work stations.

Lesson Evaluation:

TEACHING SUGGESTIONS

A number of the learning resources listed in this section have not been evaluated by Alberta Education for tolerance and understanding. Their listing is not to be construed as explicit or implicit departmental approval for use. These titles are provided as a service only to assist teachers to identify potentially useful support materials for the topics. The responsibility to evaluate these resources prior to use with students rests with the local jurisdiction. The resources designated as BASIC and RECOMMENDED (starred) have Alberta Education evaluation criteria.

TEACHING SUGGESTIONS

MODULE 1.

STRUCTURE OF THE BUSINESS OFFICE

Status: Core
Prerequisites: None

Module 1 provides an overview of the business office. Ideally, once the basic concepts have been covered, students should see first-hand how these concepts relate to an actual office situation. After the students have been given adequate direction, a field trip would be an excellent opportunity to discover the necessity of overall management and organization theory.

Alternatively, students could use their work study experience as a basis for practical application of the topics. If work study is to be used, Module 1 should probably be covered later in the course. Scheduling the module for later in the course would also allow for more planning time for setting up stations that suit the abilities and interests of the students.

Suggested Evaluation Methods

1. Oral or written report of findings following the field trip.
2. Evaluation, by the teacher, of selected student activities completed during class.

Teaching Suggestions

MODULE 1: STRUCTURE OF THE BUSINESS OFFICE

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES

Organization and Management	Use fictitious examples to describe:
	- single proprietorship
	- partnership
	- limited company
	  - private
	  - public
	- professional corporation
		5/25	Have students identify companies they know of for each category. (Teacher should add names where appropriate.)	Tarnai - pp. 428-432.
				Attridge - pp. 29-31.
				Sparling - pp. 23-26.
				Booklet from Alberta Tourism and Small Business Tel. 427-3685
				- Starting a Business in Alberta.

	Emphasize need for organization and division of responsibilities among employees.		Have students "brainstorm" to list reasons for having an office. Discuss students' ideas - add on any missed items.	Tarnai - pp. 4-5. Attridge - pp. 5-6, 34, 36, 37, 40.
	Show several organizational charts (handout or overhead) depicting different levels of complexity. Explain the charts and show how responsibilities flow.		Give students a fairly simple organizational chart with the job titles removed. Have students fill in the blanks from a list of given job titles. Prepare an organizational chart for the school or a club.	Use organization charts which come with kits or simulations - e.g., A La Carte/Lester Hill.
	Show the relationship of an organizational chart to job descriptions. Show how various functions are not specific to one position or person. Note: Module 6 Topic, "Business Systems", could be included here.		Review an office manual. Compile an organizational chart and job descriptions for a work situation - school, office, work experience station, part-time job employer, or an office visited on a field trip.	Tarnai - pp. 224-226. Attridge - pp. 71-72.
Office Functions (Overview)**	Explain the role of the office in a business enterprise.	7/25		*Luke - Unit One.
	Discuss the coordination and relationship between the office worker and the functions and services within the organizational structure: - managerial/administrative/ supervisory - personnel			

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Office Functions (Overview)** (cont'd)	- public relations - research and development - communications (internal and external) - information processing - records management			
	Outline skills needed by personnel involved in one or more of these functions.			
	Discuss the purpose of office manuals.			
	Discuss problem-solving and conflict resolution, and formal and informal channels.		Review case studies in problem-solving and office etiquette.	*Luke - Worker Actions and Interactions: pp. 174, 389-390, 637-638. Dear Sam - Sam Ion (Personal Library Publishers)
			Give students situation cases. Have them break into groups to discuss and make recommendations as to how the problem could be solved.	Office Etiquette - Dostal (Weston-Walch) Chapters 2, 3, 4.
			Collect sample letters appropriate to the topic from newspaper columns like Dear Abby, Dear Sam. Have students suggest answers; compare and contrast with answers given by the columnist.	Magazine, The Secretary, includes cases each month.
	Examine the complexity of office organization and functions as related to number of personnel, size of operation, and degree of specialization.			

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Organization of Work**	Using a diagram, explain factors which determine how an office is organized - work flow, work responsibilities, meeting needs of customers, noise, use of machines, etc. Emphasize effective use of space to promote efficiency.	12/25	Visit an office and draw a floor plan. List possible advantages of the plan. (Could be incorporated into same field trip as Topic 1.)	*Luke - Unit 3, pp. 70-75. Tarnai - pp. 204-210. Attridge - pp. 83-89.
			Give students a copy of the floor plan. (Show walls and plug-ins.) Have students plan location of certain offices, desks, equipment. (Works best if kept fairly simple or some details are already filled in.)	Tarnai - p. 233 #3.
	Demonstrate how to organize a desk. (Diagrams from magazines will help.)		Draw a floor plan of an ideal office. Include prices of furniture, supplies, decorating items.	Magazines or brochures from suppliers of office furniture and accessories.
	Show pictures of different types and styles of desks or work stations. Discuss advantages and requirements based on space, machines, tasks.			Visit to an office furniture showroom.
	Explain use of "secretarial cope kit". Develop list of possible items to include: small dictionary, reference books, procedures manual, nail file, aspirin, comb, safety pins, mending kit.			
	Discuss the concept of productivity. Outline strategies for improving work. Identify reference materials that would assist in task completion.			
Office Safety	Develop a "tip sheet" outlining suggestions for efficient and proper use of equipment and supplies. e.g., cords, file drawers, jewelry and machines, proper footwear, climbing on stools, protecting the back when lifting.	1/25	Case studies. View films. Keep a "Safety Watch", rewarding students with points each time they observe a safety hazard, correct it, and write it up.	Occupational Health and Safety (Tel. 427-8848).
	Examine the factors that affect safety in the working environment.			

*Approved resource.

**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Employees' Benefits and Protections	Examine safeguards and restrictions provided by legislation and policy guidelines: - Individual Rights Protection Act - Anti-Discrimination Act - Unemployment Insurance Regulations - Workers' Compensation Regulations		Keep a file of newspaper clippings related to these topics. Have a bulletin board display.	Information from: - Queens's Printer - Alberta Manpower - Alberta Women's Secretariat - Workers' Compensation Board - Employment Standards Branch, Alberta Labour Speakers from the government departments that administer the legislation.
	Explain types of benefits - medical, dental, life insurance, etc. Explain what is meant by working conditions--what may be included depends on type of employment. Outline required and optional deductions from salary.		Discuss case studies. Divide students into groups to conduct research and report to the class, either orally or in writing.	Alberta Women's Secretariat. Government labor standards. Guest speakers from Employment Standards Branch or unions. *Luke - Unit 1 Attridge - pp. 558-561.

*Approved resource.

MODULE 2.

PERSONNEL IN THE BUSINESS OFFICE

Status: Elective
Prerequisites: Module 1

Module 2 is designed to help students become aware of the personal or human interactions in an office situation, preferably through videotaped role-playing of specific cases.

Students should become familiar with lines of authority and the proper attitudes, codes of ethics, and human relations skills required to work in a specific position or job in an office.

This module also provides career preparation activities such as examining the kinds of office jobs that are available and the tasks involved in filling these positions; self-evaluation, and career-planning.

It is suggested that the students develop a portfolio of their educational and interest backgrounds, with projection of these skills and interests into future career possibilities, and an in-depth study of educational requirements for a future career. The portfolio should contain marks, samples of work, and information and documentation with respect to extra-curricular activities.

Textbooks can be used extensively as lecture and reading material, with supplementary questions and exercises.

Students should be encouraged to take an in-depth look at themselves -- their characteristics, personalities, interests, education, how they relate to and communicate with others, and how these features relate to the office careers they select.

An evaluation form similar to that used for evaluating oral presentations, could be developed for "role-playing" human relations case studies.

Teaching Suggestions

MODULE 2: PERSONNEL IN THE BUSINESS OFFICE

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Job Description	Examine staff recruitment, training, retraining, inservice, and professional development activities.	2/25		Materials available from Canada Manpower.
	Compare various job descriptions in terms of tasks performed, remuneration, and benefits received.	1/25		Statistics Canada.
	Outline the flow of work for one (or more) office function.	1/25		*Luke - Unit 1.
Human Relations	Identify, list and study positive and negative attitudes and communication skills (basic, oral, written and interpersonal), and their effect on interactions, teamwork, morale and productivity in the office.	3/25		Dostol - Case Studies pp. 33-41, 56-72. *Luke - Unit 2. Dostol - Chapter 4, "Working With Others", pp. 49-55.
	Discuss the image that should be presented in the office situation (body language, image projected by mannerisms, facial expressions, etc.).	2/25	Individually, in small groups (odd numbers work best), large groups, or whole class - discuss case studies. Determine the problems and the solutions, and role play the situation for the rest of the class.	Walch - "Interpersonal Relations", Case Studies pp. 12, 13, 31, 36, 45, 49, 50, 51, 54, 57, 60, 65, 76, 77, 96, 97, 105. Moon - MPC ED.Pub. (revised 1984) Excellent section on attitudes, images, etc.
	Stress greeting and addressing customers, supervisors, and executives; avoiding office gossip and excessive talking; and avoiding complaining and displaying prejudice.	3/25	Use different body language, facial expressions, and voice tones, for the same case, and see how differently the situation is interpreted.	
	Identify strategies for giving and receiving criticism.		Use video equipment, if it is available, so students who participate can see how they look through other students' eyes.	
	Make students aware of office politics.		Have students discuss real life observations of office and business behaviour that they notice as good or bad.	

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Human Relations (cont'd)	List pleasing and annoying personality traits. Invite school counsellors or psychology instructors to be guest speakers in exchange for students' typing services. Make students aware of the importance of effective personal grooming and wardrobe selection.		Have students list personal behaviours and attitudes that they would like to change--and discuss how changes are possible.	
	Recruit the assistance of the school's beauty culture students in presentations on personal hygiene, hair, nails and skin care, makeup, hairstyles, and wardrobe planning.	3/25	Have students develop personal portfolios of wardrobe, makeup and hairstyles that would be appropriate for the business office and which are suitable to the individual.	*Luke - Unit 1, Part 3 - Personal Qualifications for Success, pp. 25-32. Pitman - Unit 15, Social Skills in Business, pp. 213-216.
	If funding and time are available, arrange a field trip to a modelling agency for a course that includes wardrobe planning.		Have students stage a fashion show on dressing for business -- hair, makeup, and wardrobe fashions suitable for the office.	Dostol - Chapter 2, General Points for the Individual, pp. 16-21.
	Bring in a speaker from a modelling agency or a business in the community to speak about office grooming.	2/25	Recruit the assistance of the home economics sewing classes and beauty culture classes. *Luke - Exercises, pp. 32-45. *Pitman Activities - Exercises, pp. 36-38. Dostol - Case Studies, pp. 22-39. Walch - Cases on Businesslike Attitude; Personality Development; Office Procedures; Job Supervision; and Health and Grooming.	Walch - Cases. Films. Booklet: Alberta Manpower - Stay Ahead With a Good Attitude.
	Show videotapes or films about wardrobe planning, hairstyling, and makeup application.	1/25	Do a wardrobe module (assignments attached). Construct a "Dress for Success" bulletin board.	

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
			Research a basic wardrobe for $200. Do comparative shopping for basic outfit, including attention to style, adaptability of pieces, fabric, cleaning, cost, etc.	
	Discuss the degrees of formality found in various business offices.		Role play cases; if possible video tape, replay and comment on aspects related to this topic.	
Ethics in the Business Office	Develop case studies that students can relate to -- problems that occur in the business classroom, or school.	3/25	Dostol - Exercises: Chapter 7, p. 95; Chapter 8, p. 102; Chapter 11, p. 135.	Dostol - Chapters 7, 8 and 11. Social & Business Gatherings; Guests in the Office; Supervisory Behaviour; and parts of Chapter 12, Special Situations.
	Cases should be fictitious, but realistic.		Have students "collect" real-life incidents (no names), both good and bad, and give their interpretations and feelings about each incident. These should be categorized, kept in a special section of their procedures manuals, and be neatly typed.	Films.
			Walch - Case Studies, #6, Ethics and Conduct. Role play in small groups, and if possible, video tape and play back.	
			Have students keep a daily log book -- confidential between teacher and student -- to record their feelings about things that happen in class. The teacher responds on a daily basis. This is to encourage students to have patience with others if they find them to have annoying habits. It also gives students a chance to express their feelings, get some feedback, and reflect on the situation rather than react to it, thus handling situations in a more ethical manner.	

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Ethics in the Business Office (cont'd)			The daily log book is particularly helpful if the class is engaged in a group simulation, and students have to make an extra effort to get along with others. It also helps forge a line of communication with the teacher for individual attention on confidential matters that affect students' classroom behaviour.	
Career Preparation Activities	Have guest speakers from HIRE A STUDENT, the Alberta Career Center (arrange with them to do their total presentation for students), employment agencies, and/or personnel offices of large local organizations or businesses.	1/25	*Luke - Exercises: pp. 648-650, 659-662, 670-672, 679-682. Tarnai - Exercises: pp. 299-301. Pitman Activities - Exercises: pp. 96-107.	*Luke - Unit 17, A Professional Office Career, pp. 639-682. Tarnai - Chapter 13, The Personnel Office: Employment, pp. 277-301.
	Invite a guest speaker from professional organizations such as Executive Women International and PSI (Professional Secretaries International).	1/25	Have students prepare a personal business portfolio following the guidelines set out by the Executive Women International competition. Arrange a prize for the best portfolio.	*Pitman - Unit 9, pp. 151-188, Job Search & Application. Films.
	Arrange for personnel interviewers to come to the school and participate in videotaped job interviews with students. Students select a "job" they would like to have, do a career kit in duplicate, and then participate in a mock interview. Obtain feedback from the person being interviewed. Review the tapes with students, individually. Show (with student permission) interviews that are particularly good, or different, to the whole class.		Have students research jobs available locally (newspapers, personnel agencies, personal contacts, etc.), and do a personal inventory to determine a suitable job, and whether they have the education and qualifications for it. Prepare a career kit that includes student-composed letters: of application, of acceptance, of refusal, thanking for an interview, requesting references, asking for a transfer, of resignation, thanking for reference, researching a company, etc. Also include: completed example of a standard employment application, a resume, a write-up of the type of job the student is searching for, and sample interview questions.	*Booklets: Alberta Manpower, The School Work Connection Packet: Opening Doors, Keep to Career Planning.

*Approved resource.

MODULE 3.

BUSINESS COMMUNICATION

Status: Elective
Prerequisite: Module 1
Typewriting, Module 3 (recommended)

Module 3 takes an in-depth look at both verbal and written communication skills--including receptionist duties, greeting the public in person, telecommunicating, using telephone courtesy, and through written communications. Also included is the composition of a variety of letters, memos, and other common forms of communication.

The module should also cover reproduction and transmission of messages, and how to organize business meetings.

Field trips and guest speakers are valuable for this module.

A large portion of the time should be spent on building written and verbal communicating skills. Students should also spend time on exercises related to punctuation, word selection (verbal and written), and composition.

Evaluation can be based on quizzes, mailability of composed material, and clarity of oral presentations.

Teaching Suggestions

MODULE 3: BUSINESS COMMUNICATION

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Non-Written Forms of Communication	Discuss the communication process, communication tools, effective speaking and listening skills, and non-verbal communicating skills. Study the effects of oral and body language communication and develop the skill of listening.	5/25	Have students dictate a short paragraph on tape, then replay the tape and listen for voice quality--tone, volume, clarity, etc. Have students do videotaped exercises expressing a variety of feelings without verbalizing. See if others can determine what the students are trying to communicate. Using body language, facial expressions, and verbal communication, demonstrate how the same message or information can be interpreted differently because of the way it is delivered. Play "Business Charades". Make short oral presentations and have the group evaluate in terms of mannerisms, tone and volume of movements, etc. Dostol - Case Studies: pp. 84-87, Introductions. *Luke - Exercises: pp. 43-45.	*Luke - Unit 2, Basic Communication Skills: pp. 36-45. Dostol - Chapter 6, pp. 80-84, Making Introductions.
Meeting the Public	Demonstrate appropriate procedures for scheduling, recording, and confirming appointments.	3/25	Have students assume responsibility for contacting, greeting, and hosting guest speakers and classroom visitors. Have students interview students they do not know and introduce them to the class.	*Luke - Unit 4, pp. 88-98, Reception Duties, Meeting the Public and Scheduling Appointments. Tarnai - Chapter 11, pp. 236-239, Reception, Switchboard, and Telecommunications (The Receptionist).

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Meeting the Public (cont'd)	Collect a variety of short office-related articles, distribute to students and give them a limited time (5-10 minutes) to read, understand, and summarize. Call upon students at random to tell the class in 1-2 minutes what they have read. (Intended to give practice in oral skills.) Arrange a work study -- placement in a reception area to work with a receptionist and observe the duties performed (e.g., school reception office or office a student has interest in).		*Luke - Exercises and Projects: pp. 95-98. Dostol - Case Studies: pp. 84-102.	*Pitman - Unit 2, pp. 72-73, Oral Expression, Introducing and Thanking a Speaker, Making a Speech or Oral Report, Speaking Before Large Groups. Dostol - Chapter 6, pp. 80-83, Making Introductions, and Chapter 8, pp. 98-101, Guests in the Office.
Telecommunication Services	Through AGT, arrange a video teleconference with students from another town or city (e.g., Calgary-Edmonton).	4/25	Have students participate in a teleconference. *Luke - Exercises: pp. 138-139, 146-148, 158-160, 169-174.	Video - Digital, The Manager's Introduction to Data Communications (Educational Channel, parts 3 & 4).
	Arrange for a teletrainer to be brought into the school. Invite guest speakers from AGT or a local telephone exchange to discuss telephone etiquette. OR Arrange a field trip to AGT or a local telephone exchange. Arrange to bring in or visit vendors of communicating equipment, e.g., Xerox Ethernet System.		*Pitman Activities - Exercises: pp. 156-170. Tarnai - Exercises: pp. 259-262. Dostol - Cases: pp. 123. Work Study -- Have students work on the school switchboard.	*Luke - Unit 5, pp. 128-174, Telephone Procedures. Films available from Edmonton Telephones and AGT. List: *Pitman - Unit 16, pp. 217-230, Telephone and Other Telecommunications. Tarnai - Chapter 11, pp. 236-259, Reception, Switchboard, and Telecommunications. Dostol - Chapter 10, Telephone Use, pp. 118-122.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Written Forms of Communication	Put together a bank of situations and business correspondence that require responses. Select articles from business magazines, periodicals, daily newspapers, etc. Emphasize English skill-building exercises.	5/25	Have students compose responses in the form of letters, memorandums, or short manuscripts. Have students prepare a style manual, in which they keep a variety of formats for letters, memoranda and reports, and samples of composed letters for the following: letters of acknowledgement, apology, collection, complaint (and reply to complaint), congratulations, enquiry, circular letter, thank-you letter or letter of gratitude, order letter, letters regarding payments, recommendations or reservations; responses to requests for donations and sales letters; condolence or sympathy letters, etc. *Luke - Exercises: pp. 186-190, 190-203, 212-215, 225-228. *Pitman Activities - Activities related to this topic are included in every chapter in the activities guide. Tarnai - Exercises: pp. 97-100, 114-117.	*Luke - Unit 6, pp. 204-224; Unit 7; and Unit 11. Business Letters, Letter Parts, Formats, Content, and Stationary. *Pitman - Unit 2, pp. 21-71. The technicalities of language: the right words (cliches to avoid, frequently confused words, misused words, one word or two, words with accompanying prepositions); correct sentence structure, punctuation, style mechanics, capitalization, numbers, word division; the expression of language, written expression, basic writing tips, letter samples. Tarnai - Chapter 5, pp. 78-91, Person-to-Paper-to-Person Communication; and Chapter 6, pp. 101-113, Memos and Business Letters. Reiff, Communication Skills for the Processing of Words. Business English & Communication (2nd ed.) Steward, Lantham & Zimmer, McGraw-Hill. (Student workbook available.)
	Maintain a bank of actual, non-confidential letters. (Laminating will help to preserve them.)		Have students evaluate the letters' style, compare, criticize, and pick good ones.	
Reproduction of Written Information	Arrange a field trip to a local duplicating equipment vendor's show-room or training room (e.g., Xerox).	3/25	Have students identify different types of reproducing equipment, learn about selection of the best type of equipment for the job, and learn to use the equipment.	

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Reproduction of Written Information (cont'd)	If there is equipment available, train students to use it, and advertise services to members of the school or community. Arrange for vendors to leave equipment in school for a week (after demonstrating how to use it) so students can have a chance to use it. Demonstrate techniques of document preparation for copying - snip and paste, white-out, cover-up tapes. Discuss the function of the computer in the printing process.		*Luke - Exercises: pp. 373-375, 383-390. *Pitman Activities - Exercises: pp. 140-147. Tarnai - Exercises: pp. 197-201. Work Study - Arrange for students to spend time working in the school's duplicating room, or with a vendor of duplicating equipment.	*Luke - Unit 10, pp. 364-389, Reprographic Systems. *Pitman - Unit 14, pp. 199-212, Reprographics: Copying and Duplicating. Tarnai - Chapter 9, pp. 183-197, Reprographics.
Processing Written Communication and Materials	Outline procedures for processing incoming and outgoing mail. Contrast mailing procedures used in small and large offices.			
Transmission of Written Communication (Mail handling, using the postal system, and electronic methods of transmitting documents.)	Discuss classes of mail and how they are handled. Compare the services and costs of the classes of mail. Describe the special services available from the post office (registered, special delivery, money order, telepost). Explain satellite mail and other means of delivery such as courier, freight, and express services. Have the school secretary who handles mail distribution come in as a guest speaker. Arrange a field trip to the local post office.	2/25	*Luke - Exercises: pp. 480-482, 491-495, 507-510. *Pitman Activities - Exercises: pp. 125-139. Tarnai - Exercises: pp. 321-328. Work Study - a mail distribution department, preferably a station with electronic mail transmission facilities as well as traditional mail distribution methods.	*Luke - Chapter 13, pp. 472-510, Mailing and Shipping Systems. *Pitman - Unit 13, pp. 189-198, Postal Services. Tarnai - Chapter 14, pp. 303-321, The Mailroom.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Transmission of Written Communication (cont'd)	Discuss the impact of electronic technology and communicating terminals on transmission of written communication. Discuss advantages and disadvantages of using mail or telecommunication services. Have vendors demonstrate electronic transmitting equipment. Arrange for students to participate in electronic messaging - e.g., Altel Data field trip, and send a message back to the school.			
Business Meetings	Demonstrate steps involved in arranging business meetings for various types of business enterprises. Stress preparing an agenda, notice of meetings and minutes. Develop skills to promote efficient use of time, facilities, and personnel during business meetings.	3/25	Select a topic (e.g., meetings, or oral presentations), recruit a speaker (could be another student, parent, or teacher), and arrange for a presentation to be held in the form of a meeting, complete with typed and duplicated announcements and agendas. Follow up with duplicated and distributed minutes. Have students involved as recording secretaries, chairpersons, executives, etc.	*Luke - Unit 4, Part 3: pp. 262-266, Meeting Announcements, Agendas and Minutes. *Pitman - Unit 11, pp. 171-178, Meetings and Conferences. Tarnai - pp. 461-464, Preparing an Agenda, Notice of Meetings, and Minutes. Moon, MPC, Ed. Pub., Chapter 17, p. 181, Planning Meetings and Conferences.

*Approved resource.

MODULE 4.

RECORDS MANAGEMENT

Status: Elective
Prerequisites: Module 1

Module 4 concentrates on concept development, but students should also demonstrate the ability to follow the basic alphabetical filing rules.

It is recommended that this module be taught as a self-contained unit, and that the suggested topic sequence be followed.

Some advance planning will be necessary for this module, since students will benefit from seeing as many actual samples or brochures as possible. Some samples will have to be purchased, but single free samples can often be obtained from suppliers whose addresses are advertised in business magazines, especially if one uses the school stationery and explains why the request is being made. Brochures or catalogues may be obtained in the same way. Some samples are no doubt available as well in the school office, and in other local offices.

Guest speakers will enhance the module, but very technical descriptions of sophisticated systems would probably be inappropriate.

A field trip at the end of the module would provide a practical, comprehensive view of records management. Government departments or large firms who have a commitment to records management theory are excellent choices, but even the school office could provide an enlightening experience. The work study program might also provide a first-hand look at records management.

Suggested Evaluation Methods

The teacher may wish to evaluate the following:

1. Selected assignments from the module.
2. Practical application of filing rules.
3. Oral or written reports following the field trip. (If oral reports are used, each student should speak on a different aspect or topic.)

NOTE: This module has been reviewed by the Association for Records Managers and Administrators, Calgary Chapter. This group kindly contributed supporting references and definitions.

Teaching Suggestions

MODULE 4: RECORDS MANAGEMENT

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Basics for Records Management	Outline the scope of the topic. Define the terms of data, information, knowledge, record, and records management.	2/25	Have students prepare an alphabetical list of terminology, keep it up to date and insert new terms throughout the unit. Provide a good application of word processors. If typewriters are being used, prepare the list at the end of the module. Using several sample filing kits, have each student demonstrate the use of one part of the kit.	*Luke - Unit 8, Part 1. See Module 4, p. 49 of this manual.
	Explain why records are kept.			
	Identify the components of a records management program.		Have students construct a bulletin board display.	*Luke, p. 278.
	Discuss records management career opportunities.		Provide students with job titles/ descriptions. Have students research newspapers and companies for specific data.	See Module 4, pp. 52 and 53 of this manual. Please refer to the 1985 career listings in the Records Management Quarterly.
	Invite a guest speaker from: - ARMA - a government office or a company that uses a total concept for records management - a filing systems consulting company		Have students research post-secondary institutions for programs in records management.	Program booklets from post-secondary institutions.
Files Management**	Explain file systems (classification system, classifying codes, file, file folder, file system, filing).	2/25	Have students update their list of terminology.	See Module 4, p. 54 of this manual.
	List types of media used for records storage.		Have students go to the school library, public library, or LRC to locate and see samples, then prepare a list of items found, and give a full description and call numbers of the items; students should type their reports in table format.	See Module 4, p. 54 of this manual.

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Files Management** (cont'd)	Describe what a record can be.		Have students construct a bulletin board display showing examples.	See Module 4, p. 54 of this manual.
	Compare basic systems for classifying records: - alphabetical - chronological - numerical		*Luke - Exercises: p. 286, #1, 2.	*Luke - pp. 280-282.
	Have a demonstration filing center. Each drawer could show a different system, using different types of files, labels, dividers, out cards, etc.			
	Identify basic file supplies and their use (folders, labels, guides, tabs).		Have students construct a bulletin board display showing examples.	*Luke - pp. 289-293. Suppliers' catalogues. Samples from school/stores/suppliers.
	Identify basic records storage equipment and its use (drawer file cabinets, lateral file cabinets, shelf units).		Have students construct a bulletin board display showing examples. *Luke - Exercises: p. 303, #3.	*Luke - pp. 296-301. Suppliers' catalogues, brochures.
Filing Procedures**	Demonstrate the preparation of records for filing: - cross-referencing - indexing - coding - inspection - release marks - sorting	16/25	Have students update their list of terminology.	See Module 4, p. 55 of this manual. *Luke - Unit 9: pp. 293-294, 336-338.
			Give students copies of selected records. Have them inspect, index, code, cross-reference, and release the document. Use an overhead to process the first sample together with the class.	*Luke - p. 335.
			Have students use work assignments from their typing class "records".	*Luke - p. 333.

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Filing Procedures** (cont'd)			Show an example of a sorter or use a brochure to show what the sorter is.	*Luke - p. 338.
			Sort some records for the school's general office or for the department.	
	Apply basic filing (indexing) rules and guidelines.		*Luke - Exercises: pp. 317-318, #1. p. 318, #2. pp. 331-332, #1. p. 332, #2. p. 334, #1.	See Module 4, pp. 55 and 56 of this manual. *Luke - pp. 309-314, 319-326. Business Filing. Procedures - Pansegrau (Gage). Canadian Filing Practice, Smith & Laker (Pitman). *Pitman Office Handbook. *Pitman Office Handbook, Activity Guide (Unit 5), Smith, Hay Ellis (Copp Clark).
				*Luke - pp. 341-342.
	Describe basic file system control and maintenance: - charge-out/control system - charging out - following up		*Luke - Exercises: p. 304, #2. pp. 316-317, #1. p. 343, #1 (Office Skills). p. 343, #1 (Human Relations).	*Luke - pp. 295-296 (out forms) p. 341 (follow-up).
	Show examples of out cards, charge-out forms.		p. 345, #3.	
Records Retention Schedule	Outline the concept of records retention scheduling.	1/25	*Luke - Exercises: p. 287, #3.	See Module 4, p. 57 of this manual. See sample retention rotation schedule, pp. 58 and 59.
	Explain different types of records: - administrative - operational - archival - vital		Give students a set of sample "records". Have the class identify which type of record each is. Discuss fully if there should be a disagreement on a certain record.	See Module 4, p. 57 of this manual.

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Records Centre Facilities	Compare and discuss the purposes of centralized and decentralized filing. Explain the purposes of an active records centre or a central file area. Discuss inactive records, and explain the purpose of an inactive records center. Determine alternative locations for inactive records.	1/25	*Luke - Exercises: pp. 330-331, #2.	*Luke - Unit 8, Part 1: pp. 282-284. See Module 4, p. 59 of this manual.
Other Media	Differentiate between types of records storage media: - microforms - audio visuals - electronic Show examples or pictures from brochures. Define a "record" - a record exists whenever data is organized. Data need not be put on paper to become a record.	1/25		Tarnai - pp. 169-174. See Module 4, p. 63 of this manual. *Luke - pp. 356-357.
	Identify the advantages of using microforms.			See Module 4, p. 64 of this manual.
File Project		2/25	Have students prepare a file system that meets the records management needs of an office: - select a classification system - organize a file system - prepare a file index	

*Approved resource.

Additional Information on Topics in Module 4

Topic: Basics for Records Management

1. Definitions:

Data: Raw facts and figures from which conclusions may be inferred.

Information: The analysis and synthesis of data.

Knowledge: Information that is communicated.

Record: Any information (normally on paper, plastic, or magnetic media) whose purpose is to document and/or communicate.

Records Management: The systematic control of all records from their creation or receipt through their processing, distribution, organization and retrieval, and their ultimate disposition.

2. Components of a Records Management Program:

- Automation of records and information systems.
- Inactive records storage (also Topic 5 of Module 4, Records Centre Facilities).
- Historical documentation or archives.
- Management of files (also Topic 3 of Module 4, Filing Procedures), completed forms, reports, correspondence, and manuals.
- Microfilm information systems.
- Electronic media information systems (a new field in records management).
- Records retention schedules.
- Employee training.
- Vital records protection.

3. Records Management Career Opportunities:

Large and small businesses require an effective records and information management program that ensures easy accessibility to information, uses innovative technology, makes the proper disposition of records no longer required, and is cost-effective. Records managers can also work in government, educational institutions, labor unions, foundations, or non-profit organizations.

A wide variety of positions are available in records and information management, ranging from an entry-level Records Clerk to an executive position such as the Vice-President of Information Resources.

Qualifications for a career in records and information management range from high school diploma with some office procedures training to a Bachelor's Degree with intensive course work in business management and data processing. Clerks require a minimum of education and experience. In the area of micrographics technology, vocational training can replace college or work experience.

Personal attributes essential to this field include a general mechanical aptitude, and the ability to analyze data, identify and solve problems, and plan or organize work. This profession also requires an ability to relate to people and communicate effectively.

Job Titles and Responsibilities

Records and Information Manager - determines and develops long-range corporate policies and goals for the records and information management program.

Records and Information Management Administrator - interprets and administers corporate level records management policies.

Records and Information Systems Analyst - surveys, analyzes and recommends department-level records management procedures and equipment.

Records Management Coordinator - maintains division or subsidiary company records management program in cooperation with Records and Information Management Administrator.

Reports Manager/Analyst - develops and implements corporate reports, policies and procedures.

Forms Manager/Analyst - plans, implements and coordinates corporate forms and a forms control program.

Records Center Supervisor/Technician - operates and maintains a corporate records center.

Micrographics Services Supervisor/Technician - operates a central micrographics program in close conjunction with records analyst and other corporate members.

Records Center Clerk - assists in accessing, referencing, retrieving, and disposing activities of a records center.

Records and Information Clerk - sorts, classifies, indexes, files and retrieves records; enters data into information system.

Topic: Files Management

Definitions:

Classification System: A logical, systematic ordering of records, using dates, numbers, letters, or a combination of these for record identification.

Classifying: The process of determining the code for filing records.

Codes: Numbers and/or letters used to abbreviate lengthy file captions.

File: A collection of related records treated as a unit for some specific purpose.

File Folder: A container for related records. Folders are frequently constructed of manila.

File System: A series of files which have been arranged in a logical sequence in accordance with an established system.

Filing: The process of classifying, arranging, and sorting records so they can be placed in the appropriate file container for efficient and accurate retrieval.

Hard Copy: Paper.

Microforms: Roll microfilm, microfilm jackets, microfiche, aperture cards, computer output microfilm (COM).

Audio Visuals: Slides, cassettes, transparencies, films, video cassettes.

Electronic: Magnetic tape, diskettes, disks, optical disks.

Reports: Research, technical, computer-generated.

Correspondence: Letters, memoranda, minutes of meetings.

Completed Forms: Vacation requests, purchase orders, statements of expense, student transcripts, registration forms.

Technical Reference Material: University and college calenders, suppliers, catalogues, equipment manuals.

Directives: Positive descriptions, manuals with procedures for requesting professional development funds, sabbatical leave, field trips.

Topic: Filing Procedures

1. Definitions:

Cross-Referencing: Coding a record with another file caption to indicate an alternative location where the record or information may be found.

Filing: The process of classifying, arranging, and sorting records so they can be placed in the appropriate file folder for efficient and accurate retrieval.

Indexing/Coding: "Indexing" is determining the name or number (file classification) under which a record should be filed. "Coding" is actually writing or otherwise marking that name and/or number on the record.

Inspection: Checking each record to be sure it has been released for filing.

Release Mark: A notation to indicate that the immediate need for the record has passed and the record may now be stored.

Sorting: Arranging records in filing order according to the classification system used.

Charge-out Control System: Tracking papers or file folders that have been temporarily removed from a file system and recording the activity so they can be located quickly.

Charge-out: The act of borrowing papers from a file folder or folders from a file system. A record is maintained of who borrowed the material, in which department the person is located, when the item was borrowed, and the probable return date of the item.

Follow-up: Checking on borrowed papers or file folders that have not been returned to the file system by the due date.

2. Filing Guidelines:

- Staple papers. Avoid pins and paperclips: they may become attached to the back of another file.

- Repair torn pages with transparent tape.

- Break the folder on the score at the bottom of the front flap before placing papers in it. As papers are added, the front flap will pull down automatically and the back flap will remain straight.

- Arrange the papers in the individual folder in date order with the latest date on top. Place the sheet toward the left edge of the file folder as the reader faces it, so that the page can be read as a book.

- File the papers loosely. Fastening papers to folders with prong fasteners is unnecessary unless the entire folder is frequently charged out and passed around the office.

- File only one copy of each document.

- Avoid overloading file folders. (A folder can easily hold three quarters of an inch of material if the score is broken.)

- Store bulky material in labelled expansion folders.

- Handle folders and guides by their bodies rather than by their tabs. The tabs are intended to be a means of identifying contents, not handles.

- Straighten the contents of a file drawer by moving forward the bottoms of the folders and guides, not the tops.

- Leave about four inches of working space in each file drawer of active records to permit filing and retrieving.

- Place semi-active or seldom-used files in the top or bottom drawer of the file cabinet. Use the remaining drawers for current-year files. Consider keeping current-year files and the previous year's files in your cabinet and sending the other records to off-site storage.

- For every major division or primary heading within the file system, prepare a corresponding file bearing the same caption as the primary heading. This file can be referred to as a general file. File all related records in it by date with the most recent date on top.

- When approximately ten related papers accumulate prepare a new folder. Label it with an appropriate secondary heading or as a category within the primary division. NOTE: A folder labelled "miscellaneous" tends to become a catch-all.

- Avoid speculative files. Prepare a new folder only when there is sufficient related material to be filed.

Topic: Records Retention Schedule

Definitions:

Records Retention Schedule: A list of all records maintained by an organization which specifies the length of time each is to be maintained in the office area and records centre, and serves as a timetable for the regular transfer of records to off-site storage and/or final disposition.

Operational Records: Records created by the organization or department while carrying out its basic function that are unique to that organization or department.

> If the organization sells a product or service, operational records generated might include: marketing and sales while acquiring the order; research and manufacturing while the product or service is being produced; distribution while it is being delivered; and accounting and finance when expenses are incurred or income is earned.

Project files are another example of operational records.

Administrative Records: Records that are created by the organization or department while carrying out its basic function, and that serve in an auxiliary or supporting capacity to operational records.

> Examples of major headings or categories within an administrative collection include: administration (information circulars, mandates, policy and procedures, regulations); finance (accounting, budget); and organization/staffing/manpower (job descriptions, surveys and studies, time sheets, training, travel, vacation schedules). The major sections of the administrative records tend to be common from one organization to another.

Archival Records: Records retained permanently for historical reasons, for the benefit of scholars and posterity.

Vital Records: Records essential to the reconstruction of the business in the event of a disaster.

Sample of a Rotation Schedule

Subject Area	Subject	Description	Retention Period and Remarks
Plans and Programs		Policy Routine	5 years A-2, D-3 2 years
Politics	Elections	Federal, provincial and other governmental organizations, including ballot papers, election accounts, policy re elections, etc.	Retain records of previous election only.
Records Management	General	Policy Routine	5 years A-2, D-3 2 years
	Disposal and scheduling	Policy Routine	5 years A-2, D-3 2 years
	Disposal and scheduling authorities	Treasury Board Minutes, Public Archives of Canada Authorities, attached records, schedules and lists of individual files destroyed in the case of submissions with no continuing authority.	
		Authorities.	Until superseded or amended.
		Lists and indices of files destroyed.	10 years after files destroyed, transfer to Archives Branch, Public Archives of Canada.
	Indices and registers		Consult the Public Archives of Canada.
Regulations	Acts and legislation	See Acts and Legislation.	
	Administrative	See Circulars, Directives and Orders.	

All policy records as defined in procedures manual must be referred to the Archives Branch of the Public Archives of Canada.

Reports and Statistics	General	See under the specific subject(s) of the report, as well as below.	
	Annual (departmental) report	Drafts, supporting documentation and correspondence.	1 year after publication of report. Before disposal, consult the Public Archives of Canada for selective retention.
	Other reports	Weekly, monthly, etc., of a routine nature.	3 years or when supersede by a cumulated report.

Subject Area	Subject	Description	Retention Period and Remarks
Reports and Statistics (cont'd)	Intelligence reports	Military, criminal.	3 years. Before disposal, consult the Public Archives of Canada for selective retention.
		Post reports from abroad.	For departments primarily concerned, 3 years. Before disposal, consult the Public Archives of Canada for selective retention. Other departments-1 year or when superseded or obsolete.
	Statistics	Miscellaneous.	5 years A-2, D-3
Secretarial and Stenographic Services	See "Office Services"		
Security	General	Policy routine.	5 years A-2, D-3 2 years
	Breaches		6 months
	Clearances	Documents and papers.	2 years

All policy records as defined in procedures manual must be referred to the Archives Branch of the Public Archives of Canada.

Topic: Records Centre Facilities

1. Active Records Centre

- Definitions:

Active Records: Records used on a regular basis.

Active Records Centre of Central File Area: An area that houses all active records in one location within a department or organization.

- Purpose of Active Records Centre:

Centralization encourages information sharing and provides a uniform approach to the file system. All records are stored by the same rules and retrieved by the same procedures.

NOTE: Large organizations do not find a totally centralized system efficient because placing the central records in a location convenient for all departments is virtually impossible. In such cases, files centralized within each department may be more viable.

2. Inactive Records Centre

- Definitions:

Inactive Records: Records that are seldom used but must be retained for administrative, operating or legal reasons.

Semi-active Records: Records that are not required on a regular basis.

Inactive Records Centre: An area that is used to store semi-active and inactive records retained for administrative, operating, and legal purposes.

- Purpose of Inactive Records Centre:

The inactive records centre provides secure storage for semi-active and inactive records at a much lower cost, and provides efficient and accurate information retrieval.

A records centre also refiles and interfiles, and disposes of records that have been approved for destruction. "Refiling" is filing records that have been charged out and returned. "Interfiling" is placing records that were not received at the time the files were transferred to the Inactive Records Centre in their proper sequence.

- Alternative Locations for an Inactive Records Centre:

  Initially, an organization usually sets up a records centre in a building that it owns or leases. If the program proves worthwhile, the organization might build a records centre that is designed specifically for its needs. Another alternative is a commercial records centre, which can supplement and/or substitute for an in-house operation. Most large cities have at least one commercial records centre.

  When an organization chooses to have an inactive records centre, space requirements, security, location, and staff are important considerations. In addition, the centre must have a full-time operator who can provide efficient and accurate information retrieval. It should be noted that there is a problem in moving into temporary space as a stopgap, since it frequently becomes a permanent centre.

Topic: Other Media

1. Definitions:

Aperture Card: A flat card with a rectangular opening for a piece of microfilm.

Computer-Output Microfilm (COM): COM converts electronic computer data directly to human-readable images and prints them on a microform.

Electronic Filing: A system that enhances records retrieval by interfacing electronic and paper records. NOTE: The definition of this term varies.

Magnetic Media: Depository of information off-line from the computer data base or word processing memory, in the form of computer tapes or disks, word processing disks, or optical disks.

Microfiche: A piece of sheet film that contains as many as several hundred exposures, depending on the reduction size. It has uniform rows and columns of images.

Microfilm Jacket: A transparent plastic carrier for strips of microfilm cut from reels.

Microforms: Any form which contains microimages.

Microimage: A highly reduced photographic image of an original document that may be stored on roll film, fiche, reels, jackets or aperture cards.

Microrecords: Records stored on microforms.

Reader: A machine that projects and magnifies a microimage to eye-readable size.

Reader Printer: A machine that has the ability to produce a hard copy of a document shown on the screen.

Roll Microfilm: A length of microfilm wound around a reel or spool (the most commonly used microform).

2. Advantages of Using Microforms:

Microforms can:

- Reduce Space. One four-drawer file cabinet full of paper can be reduced to one desk-top tray of microfiche.
- Reduce Records Loss or Theft. Microform records are in fixed sequence, guarding against misfiling, mislaying and alteration.
- Reduce File Retrieval Time. The indexing system can parallel any existing paper filing and indexing system, and retrieval is generally much faster than creating paper records.
- Reduce Amount of Paper Stored and In Use. Microform storage eliminates paper files, and yet paper copies can be made available as needed from any legible and readable microform document.
- Reduce Postage Costs. In Canada a microfiche containing 270 images of data can be mailed first class for 34 cents. Mailing reports and bulky computer printouts would be much more costly.

Contrary to popular opinion, documents should not be converted to microforms simply to save space. If an organization films inactive records for space-saving alone, it is being caught in the "3F" syndrome: film, file, and forget.

To determine whether micrographics would be a useful tool, the organization should conduct a cost justification/benefit analysis to determine the cost of implementing the system and the payback period.

MODULE 5.

INFORMATION PROCESSING

Status: Elective
Prerequisites: Module 1
Typewriting: Module 5 (recommended)

Module 5 is intended to inform students of the effects of technological change or advancement on the organization of modern offices. There are new terms to be learned, understood and used; and new equipment that makes it easier to create, edit, revise, store and distribute information.

Students should be exposed to as many new types of equipment as possible, and they should have a variety of hands-on experiences.

If vendors and businesses are not readily available, students can study advertising materials and discuss articles on modern office equipment.

Teaching Suggestions

MODULE 5: INFORMATION PROCESSING

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Electronic Information Processing	Discuss factors that have resulted in the use of electronic information processing.	4/25	*Luke - Exercises: pp. 402-4-5; 415-417; 440-443; 456-458; 466-470.	*Luke - Unit 11, pp. 392-417, Word Processing Systems, Equipment, Procedures, and Skills; and Unit 12, pp. 431-470, Data Processing Systems, Concepts, Equipment and Procedures.
	Discuss history, technological advances, variety of equipment available, and the concepts of input and distribution.		*Pitman Activities - Exercises: pp. 40-47, Data Processing; pp. 180-188, Word Processing.	*Pitman - Unit 20, pp. 311-320, Word Processing, Advantages, Equipment, Personnel, Career Paths, Configurations, etc.
	Outline the sequence of the process from document initiation to distribution.		Tarnai - Exercises: pp. 398-402. Casady - Exercises: pp. 13-20; 33-37; 201-205.	Tarnai - Chapter 17, pp. 373-397, The Word Processing Center, Background, Machines, Systems, Procedures, People, Humanizing the Word Processing Environment, etc.
	Purchase and use class sets of workbooks that can be reused.			
	Briefly demonstrate equipment, or have it demonstrated by vendors.			Casady - Unit 1, pp. 1-10, The Origin of Word Processing; Unit 2, pp. 21-31, The Cycle of Word Flow; Unit 10, pp. 187-199, Information Processing.
	Collect brochures and advertising from various manufacturers.		Have students read the materials and orally summarize what they have learned for the class.	
	Show a 1950's film that demonstrates and emphasizes the difference between modern and traditional offices.			Films: What's It All About Office Systems: Concepts and Choices Word Processing: Four Phases.
	Tour a traditional office and a modern one.			Word Processing & Information Systems: A Practical Approach to Concepts, Popyk, McGraw-Hill (Gregg). Publication: Managing the Office 1990 & Beyond, (AMS, 4-part series); Modern Office Technology.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Electronic Information Processing (cont'd)	Prepare a comprehensive glossary of information processing terms with definitions, stored on a disk.	2/25	Have students compile and continually update a list of information processing terms and definitions throughout the course. Create crossword puzzles based on glossary terms and definitions.	*Pitman - pp. 88-90, Data Processing Terms; and pp. 318-320, Word Processing Terms.
	Store definitions on Testbankfile, a computer program for developing banks of test questions. Use to quiz students on terminology.			Testbankfile (Alphatel). Teachers' Quiz (IBM). Crossword Magic (by L & C Edupro, computer software).
Organizational Concepts	Identify types of information handled by information processing systems. Discuss skills needed for efficient information processing.	5/25	Tarnai - Exercises: pp. 72-75. Casady - Exercises: pp. 53-58; 71-77; 93-99.	*Luke - Unit 11, pp. 392-414, Word Processing Systems; and pp. 418-426, Dictation & Transcription Procedures.
	Identify careers in data and word processing fields. Explain methods used to monitor the accuracy and efficiency of data processing and word processing operators. Outline capabilities and capacities of information processing equipment used in various organizations. Discuss considerations related to information processing equipment in the office (staffing, ergonomics, health concerns, environmental controls).		Have students take notes directly on electronic equipment if possible. (Do rough draft, edit, polish, print and keep in procedures manual.)	Tarnai - Chapter 4, pp. 49-70, Person-to-Electronic-Device-to Person Communication. Casady - Unit 3, pp. 39-52, The System Involves "PMPE", and Unit 4, pp. 59-70, How Words Originate; and Unit 5, pp. 79-92, Output--How Text is Recorded and Printed. Unit 6, pp. 101-116, Applications for Word Processing. *Luke - pp. 397-400, Text Editing Equipment. Film: Dictation Systems: Concepts and Choices.
Input	Identify methods by which information is originated.	14/25	Give students an opportunity to dictate materials and transcribe from a variety of letters, memorandums and reports.	*Luke - Proofreading, p. 233, Proofreader's Symbols; Rough Drafts, pp. 232-233; Final Drafts, pp. 240-241; Related to Data Processing, pp. 464-465; and Transcription Skills, p. 420.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Input (cont'd)	Demonstrate the proper procedures for recording and transcribing information on dictation/transcription equipment. Teach proofreading symbols. Incorporate these learning tasks into an applications experience.		Give students specific proofreading exercises, preferably specific to using electronic equipment. Using materials provided, have students input, proofread, edit, copy, store and distribute documents. "Buddies" proofread each other's work, using proofreader symbols.	Applications: Word Processing 3 person kit (kit, stored documents, letter merge, etc.). Aitken - Rough to Ready (extensive use of proofreader's marks with rough draft material, Canadian ed. 1984). Kruse, Heringer, Lawry - Proofreading - Developing Skills and Procedures for Controlling Accuracy and Quality of Documents.
Storage	Discuss the various media for storing records (paper, tape, microfilm, microfiche, disk). Outline procedures to control work flow and ensure sufficient retrieval and maintenance of information.			
Output	Compare the various types of equipment available to reproduce information. Make arrangements with school (or other) reproduction center for a demonstration and/or student placement on a rotating, short-term basis. Identify a variety of internal and external distribution channels. Arrange a field trip to the local post office, or bring in a speaker from the post office or a large company that has a distribution centre. (The Alberta government's Department of Agriculture has a robot that delivers the mail!)			

CLERICAL ROUTINES

Status: Elective
Prerequisites: Module 1

Module 6 can be easily covered in other parts of the Office Procedures course, but the closely related topics of purchasing, stockroom control, and sales should be studied as a unit.

Either of the following approaches would be suitable for this module: (1) combine the text and resource materials with a variety of speakers and projects, or (2) use a simulation like OJT On the Job Training, (Gregg, McGraw-Hill) or On The Job, Books 1 and 2, (Copp Clark), with some information added from texts as required.

The purpose of Module 6 is to ensure that students understand and demonstrate accuracy in completing forms. Students may need instruction in proofreading techniques as they apply to forms preparation. If a simulation is not being used, students should have some opportunity to work with actual forms that are available in stationery stores. It may be possible to combine this module with some volunteer work in the school store.

A valuable resource for this module is the Pitman Office Handbook Activity Guide, Units 1, 6, and 7.

The simulations recommended are flexible, in that students can do one or more sections depending on factors such as time and resources available and students' abilities and interests.

Suggested Evaluation Methods

There should be a balance between evaluation of content and of practical applications. If text and resource materials are used with speakers and projects, a variety of assigned activities could be evaluated. If a simulation is used, students need to know in advance how the simulation will be marked. Most simulations have a suggested evaluation system and mailability is a workable standard to apply. Along with the evaluation of the simulation, these could be evaluations of activities and assignments that concentrate on the students' understanding of routines and general systems.

Teaching Suggestions

MODULE 6: CLERICAL ROUTINES

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Business Systems	Discuss the interdependence among functions within an organization: - filing - reprographic services - word processing - data processing - mailing - shipping - manufacturing - customer service - accounting systems Recommendation: This topic should be covered very early in the course, perhaps in conjunction with Module 1, since it serves as a "preview". Discuss the importance of routines and systems to the success of an organization.	2/25	Have students refer to an organizational chart and job description of a company, and identify which people or groups of people are most responsible for the system areas. Have students identify job titles common to these areas. Have students research a company and prepare a flowchart of one or more systems. Students would have to contact and visit a company to gain this information. Have students research positions or jobs related to the various systems, including skills, aptitudes, abilities, interests, likes and dislikes, required and possible routines and methods of handling forms specific to the business involved. Library and counselling office resources, interviews with people in these positions, and guest speakers are good sources of information. All reports should be typed and duplicated and distributed to all students.	Introductory paragraphs for chapters in Luke - p. 279 (Records Management) p. 364 (Reprographic) p. 392 (Word Processing) p. 432 (Data Processing) p. 472 (Mailing) p. 478 (Shipping) p. 512 (Manufacturing) p. 546 (Customer Service) p. 586 (Accounting). Alberta Tourism and Small Business booklets: Financing a Business Operating a Retail Business Operating a Manufacturing Business Operating a Service Business Bookkeeping for a Small Business.
Purchasing Routines**	Identify procedures for purchasing goods within large and small offices: - provide a list of common terms - show a flowchart of variations in procedures	8/25	Have students construct a bulletin board display.	*Luke - p. 513 (Illus. 14-1) p. 516 (Illus. 14-3). Sparling - pp. 180-183. Procedures manuals from companies.

*Approved Resource
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Purchasing Routines (cont'd)**	Introduce techniques for handling purchase forms: - demonstrate the use of "snap sets" - show a flowchart of variations in procedure		Have students prepare a "tip" sheet. This may be most beneficial if assigned towards the end of the unit, when students realize more clearly the necessity of following procedures.	*Luke - Unit 14, pp. 534, 536 (Saving Time & Money). *Luke, p. 544. Suppliers' catalogues.
	Complete purchase requisitions.		*Luke - Exercises: p. 520, #1. *Luke - Exercises: p. 544, #2.	*Luke - p. 515 (Purchasing). *Luke - p. 523 (Illus. 14-5).
	Analyze and prepare and verify purchase orders.		*Luke - Exercises: pp. 531-32, #3. Sparling - Exercises: p. 185, #B.	*Luke - p. 522. *Luke - p. 524 (Illus. 14-6). (Illus. 14-7). Sparling - p. 183-184.
	Prepare and audit purchasing forms.		*Luke - Exercises: p. 530, #1 (Office Skills) Developing Proofreading: pp. 95-99, Skills.	
	Analyze and check invoices.		*Luke - Exercises: p. 531, #2; p. 544, #3. Proofreading: pp. 108-109.	
	Compute purchasing discounts.		*Luke - Exercises: p. 530, #2; p. 542, #1.	*Luke - p. 513 (Illus. 14-1). p. 516 (Illus. 14-3). Sparling - p. 180-183. Procedures manuals from companies.
	Small offices: - provide list of common terms - show flowchart of procedure variances		Using Learning Resources Distributing Centre catalogue, students compute discounts.	
Receiving Routines	Discuss the procedures for receiving goods, and the importance of control procedures.	1/25	Students prepare, analyze, and verify stockroom control forms.	*Luke - Unit 14.

*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Sales Routines**	Introduce basic receiving, shipping, and billing procedures.	5/25	Have students construct a bulletin board display.	*Luke - p. 517 - Shipping pp. 522-526 (Filling an Order). Sparling - p. 186.
	Prepare, analyze, and verify sales forms (sales orders, invoices, cash sales, credit memoranda).		*Luke - Exercises: p. 569, #2 (Human Relations); p. 569, #1 (Office Skills). Sparling - Exercises: p. 195, #B.	*Luke - pp. 561-564. (Credit Terms). Sparling - pp. 187-190. Additional resources may be needed.
	Determine selling price (taxes, mark-up/down, discounts, margin).		*Luke - Exercises: p. 544, #2.	Sparling - pp. 191-194. Guest Speaker: Sales Department Manager. Additional resources may be needed.
Banking Routines**	Discuss the features of a current bank account.	5/25	*Luke - Exercises: p. 611, #1.	*Luke - pp. 598-602.
	Invite a guest speaker from a bank -- speaker should concentrate on "business routines", accounts and procedures.			Tarnai - pp. 406, 409. *Luke - pp. 563-564.
	Outline the procedures for making deposits.		*Luke - Exercises: p. 570, #1. *Luke - Exercises: p. 610 (Office Skills #2).	*Luke - pp. 602-605. Tarnai - pp. 407-408.
	Demonstrate procedures for bank account reconciliation; obtain sample forms from a local bank.		*Luke - Exercises: p. 611, #2. Tarnai - Exercises: p. 421, #2 (combines all 3 topics). Have students create a bulletin board display.	*Luke - Unit 16, pp. 605-608. Tarnai - pp. 411-412.

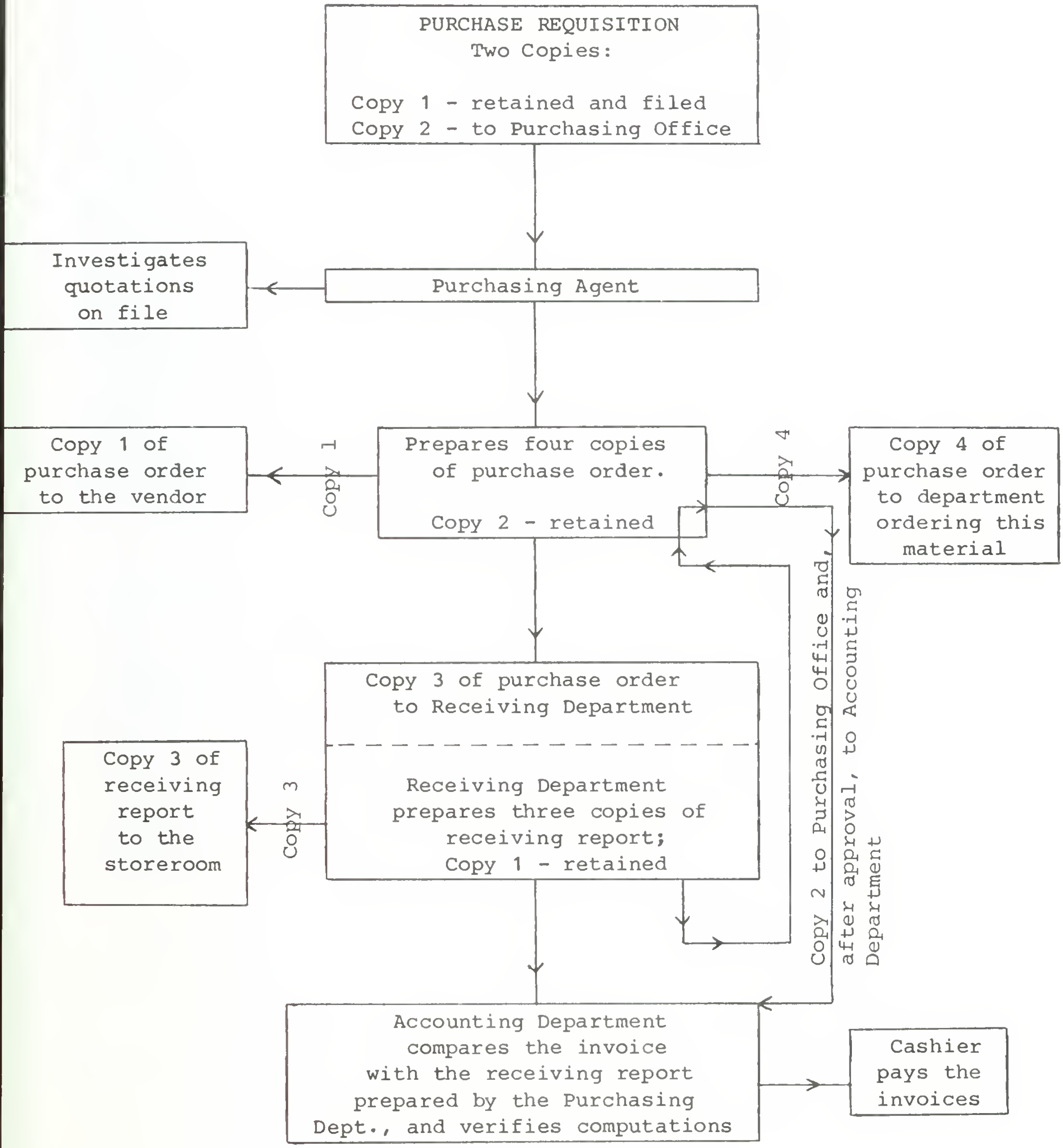
*Approved resource.
**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Shipping Routines	Present alternative transportation methods, and discuss their advantages and disadvantages (air, land, sea).	4/25	Divide class into three groups. Within each group, have each student pick or locate a firm that does shipping and contact the firm by phone or mail to request information. Then students report back to the class with basic findings. Each group prepares a chart comparing services/prices/restrictions, etc. Note: This assignment could cover all sections of this topic.	*Luke - Unit 14, pp. 478-479. Tarnai - pp. 351-352. Sparling - pp. 347-348; pp. 350, 353; pp. 354, 356. Tarnai - p. 335. Sparling - pp. 351-352. Additional resources may be needed.
	Discuss the terminology involved in shipping routines (charge, prepaid, COD, FOB, CIF).			Additional resources may be needed. Sparling - p. 350.
	Explain the importance of insuring goods.			Additional resources may be needed. Sparling - p. 348.

*Approved resource.

MAJOR SYSTEMS OF BUSINESS	PROCEDURES
Purchasing	Placing the order Receiving the goods Accounting for purchase and payment thereof Return of unsatisfactory goods
Sales	Receipt of order Processing the order Shipment of goods Accounting for sale Accounting for receipt of payment Sales returns and allowances
Financial Accounting	Purchases Sales Cash receipts Cash payments Payrolls Financial reports
Cost Accounting	Material costs Labor costs Manufacturing overhead costs Completed work Inventory procedures
Employee Relationships	Hiring procedure Training procedure Payroll procedure (see Financial Accounting) Evaluating and follow-up procedure Operating a suggestion system
Corporate Relationships	Borrowing money from banks Sale of additional stock or bonds Payment of dividends Preparation of tax reports

Analysis of Purchasing System


PURCHASE REQUISITION
Two Copies:
Copy 1 - retained and filed
Copy 2 - to Purchasing Office
Purchasing Agent
Investigates quotations on file
Prepares four copies of purchase order.
Copy 2 - retained
Copy 1
Copy 1 of purchase order to the vendor
Copy 4
Copy 4 of purchase order to department ordering this material
Copy 2 to Purchasing Office and, after approval, to Accounting Department
Copy 3 of purchase order to Receiving Department
Receiving Department prepares three copies of receiving report;
Copy 1 - retained
Copy 3
Copy 3 of receiving report to the storeroom
Accounting Department compares the invoice with the receiving report prepared by the Purchasing Dept., and verifies computations
Cashier pays the invoices

General Job Descriptions for a Manufacturing Firm

Accounts Payable Clerk. Maintains records on what the company purchases from other businesses. Keeps track of the payments made and can tell the company how much it owes at any time. Makes sure the company pays its bills on time.

Accounts Receivable Clerk. Maintains records on customers and the amount of any purchases and payments they make. Sends out a statement to each customer every month to tell how much is owed.

Billing Clerk. Works with information supplied by other clerks and prepares an accurate bill for each sale that the company makes.

Clerk-Typist. Does many different things each day. Uses a wide range of skills and abilities to cope with an ever-changing workload that includes producing mailable copy and dealing with clerical activities. May have contact with many people in and out of the company.

Credit Clerk. Helps determine credit limits - how much a customer can owe the company without having to pay the bill right away. Has to approve orders to make sure customers don't go beyond their credit limit. Maintains confidential records.

File Clerk. Puts business papers of all kinds in order. Stores papers in files and helps locate information on file as requested.

Mail Clerk. Sorts incoming mail for distribution within the company. Picks up mail from each department and prepares it for delivery within the company or the post office. Meets and talks to many people. Must maintain a pick-up and delivery schedule.

Office Cashier. Handles all cash and checks received by the company. Deposits money in the bank. Writes checks to pay the company's bills. Must keep correct records of what money the company receives and spends. Must keep money in a safe location.

Order Clerk. Receives orders from customers. Makes sure orders are clear and correct. Transfers order information to the company's order form.

Payroll Clerk. Works with employee salary information, time cards, and tax tables. Calculates how much money each employee has earned and how much will actually be received. Keeps all payroll information confidential.

Personnel Clerk. Checks job applications, scores tests, and completes forms for people applying for jobs. Keeps records of personnel already employed. Has considerable contact with people in and out of the company.

Purchasing Clerk. Prepares purchase orders for items the company needs to run its business. When the items arrive, ensures the company has received what it ordered. Has considerable contact with people in and out of the company.

Stock Control Clerk. Maintains records of the goods and supplies that come into and go out of the company's warehouse or stockroom. Requests goods and supplies when quantities get low.

Traffic Clerk. Works with business forms needed to transport goods into and out of the company. Uses traffic charts to calculate freight charges. Handles claims for lost or damaged shipments.

Typist. Types a variety of business papers - letters, memos, lists, envelopes, file cards, cheques, labels - in mailable form. Works from rough copy. Checks work carefully and corrects errors as necessary.

SECRETARIAL ROUTINES

Status: Elective
Prerequisites: Module 1
Corequisite: Typewriting - Module 8

Module 7 is intended to inform students about secretarial routines, and to provide an opportunity for students to use reference manuals and do some correspondence activities such as typing (inputting), formatting, and editing. The greater portion of time should be spent on using reference manuals and doing the activities related to the concepts. Students should also learn to be responsible for evaluating their own level of productivity through production measurement.

Some time should be spent on travel and financial management, but more time should be spent on having students research and present information on a specific topic or task in the form of a business meeting. The future office worker must learn to participate in business meetings at other levels besides serving as recording secretary.

Teaching Suggestions

MODULE 7: SECRETARIAL ROUTINES

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Input/Output of Information	Demonstrate efficient information processing skills.	15/25	*Luke - Exercises: pp. 186-190; 212-215; 225-228; 271-276.	*Luke - Units 2 and 16; Unit 6, pp. 176-190, Letter Parts; pp. 191-215, Formats; pp. 216-228, Stationery; Unit 7, Reports, pp. 230-276.
	Provide a variety of materials for students to work from. For example, each student could have a kit or workbook that meets the objectives of using text-editing equipment and transcription equipment.		*Luke - Exercises: pp. 415-417.	*Luke - Unit 11, Input/Output/ Editing, pp. 406-417.
	Promote effective listening skills to facilitate proper response to instructions.		*Luke - Exercises: pp. 427-430. Tarnai - Exercises: pp. 114-117 and 140-145.	*Luke - Unit 11, pp. 418-430, Dictation & Transcription Procedures. Tarnai - Chapter 6, pp. 103-114, Letters: Chapter 7, pp. 118-140, Reports.
	Dictate instructions to students instead of writing on the board, and see if they get the instructions straight.		Have students produce a variety of documents from several methods of input, including dictation and using text editing and transcribing equipment. Have students produce mailable copy from straight copy or edited and non-edited material (written or typed).	*Pitman - Unit 18, pp. 239-299, Typing Techniques.
	Present many tables in handwritten and rough draft form for formatting practice.		Have students do exercises for text editing from a rough draft, edited text, etc. Use a number of different formats and exercises of varying levels of difficulty. Have students take person-to-person dictation (and give person-to-person dictation to other students). Have students work from individualized kits with dictation tapes.	Word Processing Applications, Walker, (Canadian) Copp Clark. Rough to Ready - Aitken, Copp Clark Pitman (Canadian). Films. References.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Productivity	Discuss how productivity affects an operator's salary and opportunity for advancement. List circumstances that can affect the length of time needed to complete assignments. Discuss the various ways productivity can be measured. Place deadlines on assignments, and dock for each day that passes before assignments are handed in.	2/25	*Luke - Exercises: pp. 84-86. *Pitman Activity - Exercises: pp. 47-54. Casady - Exercises: pp. 143-152. Have students measure daily production by line count (ULP - useable lines produced). Have students punch a time clock, or use a sign-in sheet. (Have them clock in and out during class time as well.) Have students keep a daily log of their activities and accomplishments. Collect either on a daily or weekly basis and tell them your perceptions of how they have managed their time. This requires that you keep a log (exceptionally late, early leave, out of class, unproductive work).	*Luke - Unit 3, pp. 78-83. *Pitman - Unit 4, pp. 91-98, Efficiency, Time & Space Management. Casady - Unit 7, pp. 125-142, Procedures for Control.
Executive Secretary/ Administrative Assistant Functions a. Meetings	Ask students to research business topics of their choice and make oral presentations of 10-15 minutes duration (or longer) at a "business meeting", chaired by students. Have a recording secretary. Rotate students through the various roles, such as preparing agendas, preparing minutes and making all room and equipment arrangements. *The time spent on this task depends on the number of participants, and the length of the presentations.	8/25*	*Luke - Exercises: p. 272, Questions 1-5, (comprehension); Questions 1 & 2, (human relations); p. 273, Question 1, (applying office skills); p. 274, Question 2. *Pitman Activities - pp. 108-116. Arrange for guest speakers, and run the presentation as if it were a business meeting. The chairperson and secretary are responsible for composing and sending thank you letters.	Tarnai - pp. 461-464, Preparing an Agenda, Notice of Meeting and Minutes. *Luke - Unit 7, Part 3 and Unit 4, Part 3; pp. 262-266, Meeting Announcements, Agendas and Minutes. *Pitman - Unit 11, pp. 171-178, Meetings & Conferences. Berezowsky - A Practical Guide to Arranging & Recording Business Meetings.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Executive Secretary/ Administrative Assistant Functions (cont'd) a. Meetings (cont'd)			If several participants are interested in aspects of the same topic, get consensus from the group ("as a business meeting") on decisions or suggestions related to the choice of topics.	Films.
			Have students demonstrate an understanding of how to set up and run business meetings effectively and efficiently.	
b. Financial Management	Arrange for a field trip to a bank or financial institution.	3/25	*Luke - pp. 631-637.	*Luke - Unit 16, pp. 586-631, Accounting Systems.
	Bring in guest speakers who are involved with finances in businesses and organizations -- parents, etc.		Tarnai - pp. 419-423.	Tarnai - Chapter 18, pp. 405-418, The Finance Center.
	Stress balance sheet, profit and loss statements, chequing accounts, making deposits, petty cash, records.		*Pitman Activities - pp. 15-39.	*Pitman - Unit 1, pp. 1-20, Banking and Financial Management.
c. Travel	Make arrangements to spend the day with an OP class in another city or town. Have the class make arrangements for travelling, plan an agenda, prepare a report on their return, and compose any necessary letters of thanks.	1/25	*Luke - pp. 124 and 125. *Pitman Activities - pp. 171-179.	*Luke - Unit 4, Part 3, pp. 112-119. *Pitman - Unit 17, pp. 231-238, Travel Arrangements. Train and airline schedules.

*Approved resource.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Executive Secretary/ Administrative Assistant Functions (cont'd)				
c. Travel (cont'd)	Arrange for a travel consultant to come and speak to the class about business travel benefits. Arrange for an executive secretary who does planning for travel to speak to the class. Take the class to a large travel agency, or an airport or train station.	1/25		

MODULE 8.

OFFICE SPECIALTIES I

Status: Elective
Prerequisites: Typewriting - Module 8

Module 8 can be very valuable to the student because it provides realistic experience and puts in perspective many of the topics covered in business education courses. This module is recommended for Grade 12-level Office Procedures students.

The approach taken will depend on school resources, availability of community placement possibilities, and the student's abilities and goals.

If a work study program is selected, it must be planned in terms of the student's whole school program. Work study is an opportunity for students to work at a business location for a short period. Students do not earn additional credits and are usually not paid. Teachers could organize this project in cooperation with the Work Experience Coordinator. Various approval and evaluation forms must be completed. Samples are provided on pages 89-95.

Objectives

The expectation for the work experience is that students will:

1. have an opportunity to participate in meaningful work.
2. gain an understanding of the importance of developing acceptable work habits, good grooming and the need for self-discipline.
3. develop an understanding of positive attitudes for getting along with people.
4. learn about the organization of business and the relationship of employee to employers, unions and government.
5. be able to explore career opportunities.
6. receive assistance in making the transition from school to the world of work.

If a student will miss examinations or assignments, this must be planned and coordinated in advance with the other teachers. As well, there must be communication with the parent(s) to ensure that the student receives support from home.

Some students are able to participate in this program, but others cannot. For some students, an in-class simulation or work study program within the school is more suitable. Students would rotate through different areas (reception, typing, duplicating, mail, stock control, school store, etc.), working in a helping role and being evaluated in each area by the regular employee or perhaps the head secretary. Students can gain experience about work within the class time and not miss other classes.

Generally, 15 to 18 hours should be spent on the work station. This leaves some time beforehand to prepare students for the program. Several hours should also be allocated for report preparation and presentation following the program.

Suggested Evaluation Methods

1. Work Study Program: Request the employer to evaluate the student using a form such as Module 8, page 92. In addition, students could be asked to prepare a report which can be presented orally or submitted at the completion of their work study experience. An outline of what could be included in the work study analysis report is outlined on pages 93-94. For a grade for this project, combine the evaluation of the employer and the teaching report.

2. Simulation: Specific tasks should be marked for mailability. Some marks should be allocated for support activities, such as the list of terminology, self-evaluation, company research, and career exploration.

MODULE 8: OFFICE SPECIALTIES I

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
OPTION I				
Work Study Program		1/25	Have students provide a list of at least three types of business they would like to explore.	Some contacts might be obtained through school administrators. Work experience program advisors would be suitable coordinators.
Specialized Terminology				
Specialized Resources		1/25		
Application of Basic Skills**		5/25		
Development of Specialized Skills**	Make contacts and set up communication channels.	12/25		
Assessment and Evaluation**		2/25		
Management of Time, Resources, and Personnel**	Give participating businesses an outline of what the student should experience or discover, and establish dates and times.	1/25	Have students ensure that parent and teacher forms are completed and submitted by deadline date.	
Scope of Knowledge and Skills within Specialization		1/25	Have students research the type of company they will work for, prepare a list of terminology, and check the location of firm as well as parking or public transportation information.	Public/school libraries. Reference books. Newspapers, magazines, personal contacts.
Career Opportunities**	Visit work stations to deliver forms (such as evaluation form) and meet with contact person.	2/25		
	Give students the assignment sheet outlining topics, points to look for, evaluation method, self-analysis, reporting expectations.		Have students make preliminary visits to confirm transportation, lunch facilities, dress codes, etc., and to meet with contact persons.	
	Contact work stations after first few days to ensure all is progressing well.		Have students attend stations for a specified number of days, and keep a diary, using a format suggested by the teacher.	

**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
OPTION I (cont'd)	Collect evaluation forms from employers. Seek informal feedback on program, student placement appropriateness, etc.		Have students report to the school in a format determined by the teacher.	See pages 89-95 of this manual for: - forms for student/parent teacher signatures - evaluation form for employer - outline for student regarding points to look for, self-analysis, reporting expectations - work study evaluation
Career Opportunities** (cont'd)	Assign evaluation marks.			
OPTION II				
Teacher-Prepared or Publisher-Prepared Materials	Introduce the simulation carefully and thoroughly, emphasizing objectives, expectations, evaluation methods, etc.		Have students prepare terminology lists appropriate to the type of company they are researching. Have students research similar companies in the community.	Recommended List: *Luke - Computronics, pp. 173, 388, 636, 682. Note: Requires Student Activity Books. On The Job Books 1,2, Copp Clark. 9 to 5, McGraw-Hill. *Top Music. *Snow Country. Libraries. Newspapers, Magazines.
	Where possible, stagger the work flow, and stress the management of time and setting priorities.		Have students evaluate themselves.	Self-evaluation, Tarnai - pp. 229-230.
			Have students research job descriptions, necessary skills and training, prospects for the future, etc.	Alberta Career Centre. Counselling departments. Alberta Manpower. Newspapers. Employment agencies.

*Approved resource.
**Indicates topic to be emphasized.

SAMPLE

COOPERATIVE WORK EDUCATION

WORK STUDY

STUDENT INFORMATION & PARENTAL CONSENT

NAME ______________________________ SOCIAL INSURANCE NUMBER __________
(Surname) (Please Print) (First Name)

ADDRESS ____________________________ PHONE NUMBER __________________
(Postal Code)

AGE ____ BIRTHDATE __________ MALE ______ FEMALE ______

TYPE OF WORK STUDY DESIRED ____

AFTER SCHOOL RESPONSIBILITIES _____________________________________

TIMETABLE

BLOCK	COURSE	TEACHER

PARENTAL CONSENT FOR PARTICIPATION IN WORK STUDY

_________________________ has my permission to participate fully
(Name of Student)

in Work Study during the school year 19__ (Permission required by all students under 18 years of age.)

SIGNED ____________________________ DATE ________________

SAMPLE

COOPERATIVE WORK EDUCATION

PERMISSION TO PARTICIPATE IN WORK STUDY

STUDENT ______________________ SCHOOL ______________________

The above named student wishes to be absent from school

1/2 day A.M. __________
1/2 day P.M. __________
Full day __________

From ______________________ To ______________________

to participate in Work Study.

An Act Respecting Public and Separate Schools, 1970, Section 161 states:

> "A pupil attending a work experience program shall receive credit for attendance at school for the time he spends in the program."

Students must have the consent of all classroom teachers to participate and your co-operation would be appreciated.

Students understand that all assignments, tests, etc., should be made up upon return to school.

PERIOD OR BLOCK	SUBJECT	TEACHER'S SIGNATURE

____
Student's Signature

For further information, please contact your Cooperative Work Education Coordinator.

WORK STUDY CONTRACT

(sample)

BETWEEN:

Date: .... 19....

A. NAME OF STUDENT: ....
(herein called the "Student")

S.I. NO.: ....

ADDRESS: ....

TELEPHONE NO.: ....

AGE: ....

Postal Code: ....

Supervising Officer: ....

B. NAME OF EMPLOYER: ....
(herein called the "Employer")

Telephone No.: ....

COMPANY ADDRESS: ....
Postal Code

C. THE BOARD OF TRUSTEES OF____.
(herein called the "Board")

WHEREAS:

1. The Board has approved a **WORK STUDY** Program for pupils in its schools pursuant to Section 161 of The School Act.

2. The Employer and the Student have agreed to participate in the said Cooperative Work Education Program on the terms and conditions herein set forth.

WITNESSETH:

1. Period of Agreement:
The Student shall, from ...., 19..... to ...., 19....., faithfully, honestly and diligently serve the Employer as ....
and devote his/her whole time and attention to such employment during the hours of employment hereunder prescribed.

2. Hours of Work:
The hours of employment shall be .... to .... in each day of the week during the terms of this agreement except Saturdays, Sundays, statutory holidays, school holidays and any other day upon which the school the Student attends is closed.

3. Termination:
Notwithstanding anything herein contained to the contrary, any party hereto may, with or without cause, summarily terminate the agreement without notice.

4. Remuneration:
The Employer shall not be obliged to remunerate the Student for the services performed by the Student pursuant to this agreement.

5. Supervision:
During the hours of employment herein set forth the Student shall be under the direct supervision and control of the Employer; provided however the Employer shall at all times permit the Board or its representatives access to the employment site and the Student.

6. Work Study:
The Employer shall at the request of the Board or its representatives, evaluate the Student in the performance of his duties hereunder and report such evaluation on a form from time to time provided to the Employer by the Board.

7. Full-time Employee Tenure:
The Employer agrees that the employment of the Student hereunder shall in no way affect the job security of any other full-time employee of the Employer, nor the Employer's hiring practice with regard to full-time employees.

....
EMPLOYER

....
STUDENT

....
BOARD OF TRUSTEES

....
PARENT OR GUARDIAN OF STUDENT

NOTE

1. By Workers' Compensation Act (Part 4) 1973 amended by Bill 20, 1975, the Students have been deemed to be "workers" of the Government of the Province of Alberta.

2. In the event the Student shall be employed by the Employer outside the scope of this agreement, the Employer and Employee are subject to the Alberta Labour Act, the regulations and orders thereunder.

EMPLOYER'S EVALUATION OF STUDENT
WORK STUDY

Student's Name ______________________________ Date ____________

Organization ____________________ Address ______________________________

Postal Code

Rated By ____________________ Position ____________ Times Absent ________

This evaluation lists eight general areas of work performance. Please check the appropriate column and add any additional comments you feel necessary.

	Outstanding	Very Good	Satisfactory	Should be Improved	Unsatisfactory
Appearance					
Attitude towards job					
Punctuality					
Ability to follow directions					

	Outstanding	Very Good	Satisfactory	Should be Improved	Unsatisfactory
Work Habits					
Vocational Skills					
Communication Skills					
Initiative					

Does Student need help in any specific area? ______________________________

____

Additional Comments: ____

____

____

____

____

____

____

____

____

This completed form can be mailed or returned with the student.

WORK STUDY ANALYSIS REPORT
(Guideline Questions)

You will not be able to get the information for all of these questions, but do try to answer most of the ones that apply to your position. In all cases, remember business ethics - do not pry and do not take things like stationery without the approval of your supervisor.

Approach the assignment in the following manner. Perhaps take a steno pad with you to jot things down - again, if convenient and if it doesn't interfere with your work. Then, after work, at home, make more detailed notes. Decide ahead if possible, which category you will look at before you get to work that day.

I expect you to type up your report which will answer as many of the questions as possible. This is to be done in class after you finish your five days at the company. Because you will not be able to remember everything, it is most important that you make notes for yourself. If I have left out something that you feel is relevant, do include it.

In this unit, you will be marked on an evaluation sheet which I will give to your supervisor, and I will mark your written report.

Category 1 - People

- How many in each office or division? How many people work for the company?
- Job titles
- Salaries - be very careful, do not pry, perhaps you could ask for general salaries from someone in personnel - do not ask employees directly
- Requirements for positions
- How long have people been in their jobs (do not pry)? What do they enjoy (like) about the job? What do they least like?
- Show the lines of authority using an organizational chart - see me for books that show you how to do this
- Anything else you notice relevant to this category

Category 2 - Environment

- How large is this office? More than one floor?
- Types of equipment - give brand names if possible and describe them; include desks, typewriters, word processors, files, file folders, calculators, duplicating, telex, data entry, dictaphones, switchboard, any other
- Floor plan of one segment of the firm or perhaps one or more office areas
- Lunch room facilities
- Is it spacious? Crowded?
- Atmosphere quiet? Noisy? Busy?
- Pictures

Category 3 - Procedures

- What does this company do? How are the responsibilities divided among the departments?
- What is standard format for letters, memorandums and other correspondence? (Ask if you can get some samples of their blank forms.)
- Punctuation style used
- How do they answer the phone?
- What type of filing system is used?
- Do secretaries call supervisors by first name? If not, how else?
- Is there a central mail room and how is both incoming and outgoing mail handled?
- Who distributes the mail?
- Is there a procedures manual for the office?
- Is there a petty cash fund?
- Is there a receptionist for each office area?
- What are the responsibilities of the receptionist?
- Do secretaries have any reference books? What are they?
- Is there a personnel office?
- Ask for a blank application form the company uses
- Who interviews and hires new employees?

Personal Reaction

After you have finished work, I would like you to think about the company you worked for. Would you like to work for it full time? Why, or why not? Give your personal reactions about your experience.

WORK STUDY EVALUATION

Employer's Evaluation:

Outstanding .... n x 90% = ________________

Very Good .... n x 75% = ________________

Satisfactory .... n x 60% = ________________

Should Improve .... n x 50% = ________________

Unsatisfactory .... n x 40% = ________________

TOTAL divided by N to get $\frac{\_\_\_\_\_\_\_\_}{100}$

Work Study Analysis Report .... $\frac{\_\_\_\_\_\_\_\_}{50}$

Content - 30 marks
Typing, Presentation - 20 marks

$\frac{\_\_\_\_\_\_\_\_}{100} + \frac{\_\_\_\_\_\_\_\_}{50} = \_\_\_\_\_\_\_\_\%$

MODULE 9.

OFFICE SPECIALTIES II

Status: Elective
Prerequisites: Module 7
Typewriting - Module 8

If a simulation is used for Module 9, students should work in groups where work is transferred from one to another. The work should be as realistic as possible, and students should have opportunities to make their own decisions.

If the model office concept is used, a physical space must be allocated and the appropriate equipment set up. The teacher must plan ahead and collect some work for the office through the school office or the community.

Suggested Evaluation Methods

Evaluation might include self-evaluation, instructor evaluation, group evaluation and mailability of work produced. As well, daily logs and production output can be used.

Teaching Suggestions

MODULE 9: OFFICE SPECIALTIES II

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
OPTION I				
Teacher-Prepared or Publisher-Prepared Simulations	Formulate a plan whereby students set goals, measure production and evaluate production performance.		Have students complete daily sets of production goals, daily logs and daily self-evaluations.	Recommended List: - Word Processing Concepts and Applications - Ellis (McGraw-Hill). - A La Carte. - Racquets Unlimited.
Making Decisions and Setting Objectives**	Discuss goals with individual students to ensure they are appropriate.	1/25	Have students submit weekly progress reports on what they have accomplished and learned and what their priorities and goals might be for the next week.	
Planning and Setting Priorities**	Where the simulation requires students to work in small groups, explain the lines of authority and the responsibilities that lie with each job title.	2/25		
Integration of Skills		16/25		
Defining Lines of Authority	Develop and discuss with students the methods of evaluation.	1/25		
Defining Areas of Responsibility**		1/25		
Evaluating the Outcomes**		2/25		
Developing Plans for Improvement**		2/25		
OPTION II				
Model Office	Set up an office area, taking into account the types of work available and the number of students involved. Develop activities to provide the broadest possible range of office experience.		Develop the concept of "Help Unlimited"; have students provide an office service for administrators, teachers, or the community. Types of work could include typing, duplicating, telephoning, filing, office management, proofreading, transcription, payroll and accounting.	

**Indicates topic to be emphasized.

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
OPTION II (cont'd) Model Office (cont'd)	Develop a realistic flow of work from station to station and a realistic set of routines and procedures. Provide for controls and systems of evaluation (including self-evaluation). Provide for challenge and room for decision-making. Have students apply for positions and conduct employment interviews. If small groups are used, rotate each student through each position. If a larger group is used, rotate students as much as possible and provide activities for those who are not in the simulation at the time. As a minimum, the model office should contain: - reception area - counter, phone, in-out basket, materials, forms necessary. - word processing area - text-editing equipment with necessary supplies, in-out basket. - duplicating area - if small copier is not available, make arrangements for students to provide service in school's duplicating center.		Some tasks such as typing or transcription may be real, while others such as the accounting or payroll are simulated.	

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
OPTION II (cont'd) Model Office (cont'd)	Organization: Management - set up an organization chart - provide job descriptions - office manager is responsible for work flow, attitude, and attendance of employees - directing and assigning or re-assigning work Word Processing Center - several word processing stations - some with transcription machines; divide into "Administrative" and "Correspondence" specialists Quality Control Center - one station would be in charge of proofreading - rotate often since work is tiring - second station in this area is the receptionist, who receives work, requisitions, assures forms are completed properly and keeps records of all incoming and outgoing work; may establish turnaround schedule, calculate lines produced, distribute completed work; also responsible for advertising that services are available All students maintain daily logs and self-evaluations. As well, one student may be in charge of simulated payroll. It may be possible for one student to prepare purchase orders/ requisitions for the business department. Following this, the same student would handle incoming orders, stock. If volume permits, one person is assigned to maintain files regarding "customers" and "employees".			

MODULE 10.

OFFICE SIMULATION

Status: Elective
Prerequisites: Module 1

Overview

Module 10 is intended to provide students with real or simulated office experiences. Real experience can be gained through work study placement in an area of student preference, and simulated experience (including some very real experiences) can be gained through packaged office simulations. In both situations, students learn about human interaction and evaluation by others.

Suggested Evaluation Methods

Module 10, pages 103-104, provides a composite evaluation form which could be used for simulations. The form could be completed periodically throughout the simulation by the teacher and/or other students.

(This form is modified with permission of the Racquets Unlimited Simulation, Gage Publishing.)

Teaching Suggestions

MODULE 10: OFFICE SIMULATION

TOPIC	TEACHING APPROACHES	TIME	STUDENT ACTIVITIES	RESOURCES
Career Paths	Discuss various job descriptions and the responsibilities attached to each job - formal (defined) and informal (assumed).	5/25	Have students select a position at worker level and one at management level. Type up a resume, application, and letter stating qualification specific to selected position.	Casady - Unit 9, pp. 169-182, Career Opportunities. *Luke - pp. 640-647, Job Opportunities for Office Workers. Tarnai - Chapter 13, pp. 278-281, The Personnel Office; Employment pp. 292-298. Moon - Chapter 18, p. 201, Planning Your Career as a Secretary.
Integrated Office Simulation	Introduce the group simulation concept to students, stressing the lines of authority, who has decision-making responsibilities, and at what level.	20/25	Have students examine the job descriptions and apply for two positions, one at a worker level and one at a management level. They complete formal application, resume, and letter stating why they are best people for the job. Have students keep a daily log book in which they express feelings; what they accomplished; how they feel about it; how they feel about interacting with others. Teacher responds on a daily basis with comment to "ease" human relation problems, etc.	A La Carte - General Business Large Groups. Racquets Unlimited - Word Processing Simulation - Small Groups.

JOB PERFORMANCE REVIEW SHEET

NAME OF STAFF MEMBER ____________________ JOB TITLE ______________________

DATE ______________________

RATINGS: 8 points — outstanding
6 points — above average
4 points — average
2 points -- needs improvement

Points

ABILITY TO FOLLOW INSTRUCTIONS AND USE REFERENCE MATERIALS

8 points ---- Uses initiative in interpreting and following instructions and using references
6 points ---- Usually follows instructions and uses references with no difficulty
4 points ---- Follows instructions and uses directions with some difficulty
2 points ---- Needs repeated detailed instructions

ATTITUDE TOWARDS WORK

8 points ---- Takes an enthusiastic interest in work and is highly motivated to learn
6 points ---- Shows interest in work and has desire to learn
4 points ---- Has moderate interest in work
2 points ---- Shows little interest or enthusiasm for work

HUMAN RELATIONS SKILLS

8 points ---- Extremely tactful and understanding when dealing with people
6 points ---- Usually poised, courteous, and tactful in dealing with people
4 points ---- Tries to be compatible with people
2 points ---- Needs to improve human relations skills

JOB SKILLS

(word originator--composition, dictation, grammar, mathematics)
(secretarial support--typing, spelling, proofreading, grammar, formatting)

8 points ---- Possesses an exceptional command of required skills
6 points ---- Has an above average command of required skills
4 points ---- Has an acceptable command of the required skills
2 points ---- Lacks the required skills

QUANTITY AND QUALITY OF WORK

8 points ---- Has an exceptional aptitude for doing neat, accurate work that often exceeds requirements
6 points ---- Does more than the required amount of neat, accurate work
4 points ---- Does normal amount of acceptable work
2 points ---- Does less than required amount of satisfactory work

ATTENDANCE AND PUNCTUALITY

8 points ---- Never absent or late without good cause
6 points ---- Seldom absent or late without good cause
4 points ---- Occasionally absent or late
2 points ---- Frequently absent or late

COOPERATION AND DEPENDABILITY

8 points ---- Always cooperative and dependable
6 points ---- Usually cooperative and dependable
4 points ---- Cooperates when asked and is fairly dependable
2 points ---- Cooperates reluctantly and is not very dependable

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JOB PERFORMANCE REVIEW SHEET

Points INITIATIVE

8 points —— Demonstrates a high degree of initiative in all tasks and needs little supervision
6 points —— Demonstrates above average degree of initiative and needs little supervision
4 points —— Demonstrates some initiative and generally requires supervision
2 points —— Demonstrates no initiative and always requires supervision

TOTAL POINTS ________

OVERALL EVALUATION OF WORK, ATTITUDE, INITIATIVE, HUMAN RELATIONS SKILLS, AND PERFORMANCE

________ 56 - 64 points = outstanding
________ 40 - 55 points = above average
________ 26 - 39 points = average
________ 16 - 25 points = needs improvement

Employee's specific short-term goals: ________________________________

____

Employee's specific long-term goals: ________________________________

____

Employee's suggestions for improving efficient operation of RU's word processing work group:

____

____

____

GENERAL COMMENTS REGARDING EMPLOYEE'S JOB PERFORMANCE

____

____

____

____

____
Signature of Managing Director

____
Signature of Employee

____
Date

GUIDELINES FOR FIELD TRIP REPORT

RESEARCHER: ______________________________
(name)

STATION: ______________________________
(name of Company)

____
(address of Company)

CONTACT PERSON: ____________________ Phone No. __________
(name)

TYPIST: ______________________________
(name)

SUMMARY

1. TYPE OF STATION: (e.g., large or small word processing centre; individual or shared station, etc.)

____

2. TYPE OF EQUIPMENT: (e.g., name of company supplying equipment; stand alone or computer connected; communicating capabilities, etc.)

____

____

____

3. PERSONNEL: (e.g., number of operators, supervisors, positions, career path possibilities, etc.)

____

____

____

____

4. APPLICATIONS: (e.g., manuals; specifications; financial or statistical documents; short documents; forms; letters; storing of documents; calculations, etc.)

____

____

____

____

5. CONTROLS AND STANDARDS: (e.g., monitoring; line counts; supervision; expectations re quality and quantity of work produced; supervisor's comments regarding problems and future projections, etc.)

6. FACILITIES AND ENVIRONMENT: (e.g., diagram of office layout; pictures; lighting, windows; types of office furniture; office arrangement with respect to privacy, convenience -- storage and distribution centers, etc.)

7. PERSONNEL: (e.g., qualifications for different positions; standards that must be met at different levels, and for different positions; basic qualifications required -- attitude, etc.)

8. GENERAL COMMENTS AND THINGS TO REMEMBER: (on a separate page)

STUDENT EVALUATION

STUDENT EVALUATION

General Evaluation Guidelines for Business Education Courses

The business education program deals with cognitive, psychomotor and affective learning activities.

Evaluating student achievement in these domains is a process which is based on the objectives outlined for each of the modules that have been included in the course. The teacher should determine the expectations for student achievement at the time the course is being planned. A basic guideline for determining student grades is to assign marks in proportion to the comparative time spent on that topic and its relative importance.

When the objectives of a module are vocationally based, the assessment should be criterion referenced; that is, how much progress has the student made toward the attainment of specific, terminal performance objectives which are generally viewed as desirable by the workplace?

When the objectives of the module are based on general interest, the assessment could be norm referenced; that is, how does the student's performance compare with those of students in similar groups of students in the province?

Each module outlines the general PURPOSE, TOPICS and LEARNING TASKS.

PURPOSE defines the general objective for the module.

TOPICS defines the concepts to be studied. All topics within the selected module must be addressed.

LEARNING TASKS recommend the depth and scope for each topic. The learning tasks are worded in such a way as to define the expected level of understanding or skill the student should attain--MASTERY, APPLICATION, OR AWARENESS. The minimum standard for each learning task has been identified in the curriculum guide.

The affective domain of learning is emphasized in this course. Knowledge and skills are applied to the production of communication and accounting documents functional to the business community.

Human resources, interpersonal skills and public relations are vital to competition for goods and services and human resources. The worker is a competitor for the position which best utilizes that worker's skills. The worker competes for job promotion and security. Personal attributes such as a positive and co-operative attitude, pleasing appearance using appropriate clothing for the job, a desire to perform a full day's work for a full day's pay, and the necessary skills to prevent errors, correct errors and produce quality work are corporate goals.

Workers have goals of job suitability, job security, adequate salary, health and social benefits as well as freedom from health hazards on the job, respect of supervisors and a description of job expectations.

Evaluation of the aforementioned attributes and competencies is probably best performed through case studies, human relations situations involving decision making, a study project or an office simulation.

Student Evaluation in Office Procedures Courses

A major objective of Office Procedures 20 and 30 is to prepare students for an office job. Of major concern to employers, besides good office skills, are such things as: ATTITUDE, INITIATIVE, QUALITY AND QUANTITY OF WORK PRODUCED ON A DAILY BASIS: LOYALTY AND A FULL DAY'S WORK FOR A FULL DAY'S PAY--EVERY DAY (e.g., ALWAYS ON THE JOB, PRODUCTIVE TO THE END OF EACH AND EVERY DAY). These things are difficult to evaluate, and are unfamiliar to students unless they also hold, or have held, jobs while attending school.

It is therefore important to create in the classroom, an atmosphere that closely resembles an office situation. Students are used to being evaluated, but have not necessarily learned to evaluate themselves.

Specific evaluation of student progress should be based on the objectives of the modules included in the course. Although primarily a practical "hands-on" course, each module includes THEORETICAL components. Assessment should reflect the time spent on each topic. In addition, each module should evaluate efficiency and attitude, production and theory.

Recommended mark distribution for each module is shown below:

	Module									
	1	2	3	4	5	6	7	8	9	10
Efficiency and Attitude	10	40	10	10	10	10	20	30	30	30
Production	30	40	50	60	60	60	60	60	60	60
Theory	60	20	50	30	30	30	20	10	10	10

Average the five modules to determine how much to allow for:

- Efficiency and Attitude
- Production
- Theory

Note: (Efficiency and attitude can be partially the student's responsibility and partially the teacher's responsibility.)

Recommended Evaluation Strategies

Evaluation Strategy: Establishing Business Standards for Quality of Print Material

As Office Procedures is a vocational course there is an expectation that the student's production work should be mailable. Mailability is difficult to define. An UNMAILABLE document can be recognized when it contains one or more of the following:

_____ misspelled word or name
_____ material omitted or words used that would change meaning
_____ strike-overs
_____ careless erasures or corrections
_____ smudge marks
_____ errors in figures
_____ omitted or incorrect punctuation
_____ unacceptable word division
_____ improper word choice
_____ inappropriate or omitted notation marks such as reference initials, enclosure notations, etc.
_____ unacceptable format or style

The expectation for mailability will be dependent upon the difficulty of the material, the level of skill (introduction or mastery), the equipment available (electric/electronic/word processor) and time allowed to complete the assignment.

The following are alternative marking systems used in Alberta schools:

Alternative 1

5 - Mailable
3 - Correctable
0 - Not Mailable

If the item is not mailable the first time, it may be resubmitted (correctable or retyped) and be given a 3. If the item is not corrected properly or not resubmitted, the 0 is given.

Alternative 2

5 - Perfect, first submission

4 - Mailable with minor correction (punctuation, insert initials, etc.)

3 - Mailable with correctable error requiring high degree of correction technique

2 - Unmailable: cannot be corrected on original. Format is correct.

1 - Unmailable: cannot be corrected on original and format is incorrect.

Items given a 3 or a 4, assume the needed correction is acceptably made. Items given a 1 or a 2 are not accepted for resubmission.

Alternatively, the above systems can be used as a one-time marking.

Evaluation Strategy: Self-Evaluation

Students who become skillful in self-evaluation are more sensitive to how others perceive them and are more capable of assessing their own strengths and weaknesses. When this experience is provided within an Office Procedures class, students can develop this awareness and sensitivity in a situation which has limited risk and provides opportunity for growth and access to teacher support.

Students could begin a self-evaluation process using the Self-Evaluation Guide (sample on page 115) in conjunction with a Daily Record of Self-Evaluation (sample on page 116). (These are only samples and teachers are encouraged to develop their own guidelines and criteria.)

Self-evaluation could be monitored by having these sheets handed in on a weekly basis and can be compared with the instructor's observation of the student's daily performance (see page 118). Discrepancies of any magnitude could then be discussed with the student on a one-to-one consultative basis.

Additional tools for self-evaluation that could prove valuable include having students keep an informal record of dialogue with the instructor through a daily, written logbook. The logbook would communicate information on student daily activities and also provide a vehicle for expressions of concern and/or feelings by student and teacher.

Evaluation Strategy: Daily Record of Activities

A more formal daily record of activities can be maintained by the students. This would provide the students with a "picture" of their daily accomplishments which would assist them in setting and reaching goals and make them aware of their own responsibility for self time management. An example is shown on page 117.

Evaluation Strategy: Daily "Time-Clock" Record

To impress the importance of self time management on the student, a "time clock" system could be incorporated using a real time clock or by having the student use a monitored sign-in sign-out procedure. (See sample sign-in sheet, page 119.)

Alternatively, students can maintain an employee attendance record, as shown on page 120.

Evaluation Strategy: Developing Oral Presentation Skills

An important skill for all office workers is the ability to present ideas and information in small and large groups. Students benefit from the opportunity to develop and practise these skills. Sample evaluation form is shown below.

ORAL PRESENTATION EVALUATION FORM

8 points = OUTSTANDING
6 points = ABOVE AVERAGE
4 points = AVERAGE
2 points = NEEDS IMPROVEMENT

SPEAKER'S NAME ______________________

________	appropriate topic selected
________	introduction, clear what will be presented
________	interesting
________	well organized
________	presenter knows material and delivers without reading entire presentation
________	voice - clear, loud enough
________	rate of presenting (not too fast, not too slow)
________	eye contact with participants
________	dress and posture appropriateness
________	facial expressions and mannerisms (shows enthusiasm; non-irritating, etc.)
________	visual aids used efficiently and interestingly
________	delivers material in confident, convincing and enthusiastic manner
________	questions answered satisfactorily
*******	TOTAL POINTS

COMMENTS: ____

____

____

Self-Evaluation Guide

	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE
EXCELLENT 5	Groomed for the office Office conversation only Uses office manners voluntarily Shows good leadership	Works during full class time Works well in a group Good work habits Does neat work	Assumes responsibility and leadership Aims for excellence in all aspects of office work and human interactions	Does error-free, neatly formatted work Does work that is a positive reflection on the "company"	Is in class on time (or a little early) and working Does not leave early or take breaks
VERY GOOD 4	Groomed for the office Some "personal" conversing Positive influence on class Highly motivated	Does slightly less work than is capable of producing in the time period	Is willing to help others Is highly motivated to learn and do good work Is very reliable	Makes corrections and uses good format (mailable) Makes a good impression	Is 2-3 minutes late due to "explainable problems" Gets to work immediately Does not leave early or take breaks
AVERAGE 3	Wears slacks (not jeans) Works independently Puts in real effort	Puts in good effort Has problems with assignments, but overcomes them Completes less than normal	Puts in good effort Tries to research and think out problems before asking for answers Follows written/oral instructions	Does mailable, but not special work Does work several times due to minor errors Uses acceptable format	Is more than 5 minutes late "with a good reason" (not an excuse!) Gets to work immediately Takes no breaks
FAIR 2	Tends to have negative attitude Finds it difficult to work independently	Could use class time more productively Tends to "goof off" a little	Has problems following written/oral instructions Does only what is necessary to "pass"	Does work that is mailable if corrected Has problems spotting own errors and judging best format	Is more than 10 minutes late (even with reasons!) Has a "break" emergency
POOR 1	Lacks co-operative spirit Has negative attitude Lacks interest and pride in work	Does not complete assigned work within timelines specified Has problems following instructions (written/oral)	Does not meet deadlines or set priorities Leaves work area without permission	Uses poor format, does not notice errors, requires outside proofreading Has to redo and re-submit work Needs to acquire more pride in quality of work	Misses 20 minutes or more due to late arrival, early leaving, breaks, etc.

Daily Record of Self-Evaluation

Complete date, refer to grading chart, "Classroom Self-Evaluation Guide". Indicate mark for attitude, amount of work, initiative, quality of work and attendance. Average the marks for the week. Submit this form at end of period on Friday.

N.B. Absences are averaged as zero points for each column.

NAME ______________________________

DATE	COMMENTS	ATTENDANCE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTITUDE	DAILY TOTAL	WEEKLY AVERAGE

Student's Daily Record of Activities

DATE	ACTIVITIES ENGAGED IN DURING CLASS	ACCOMPLISHMENTS (WHAT WAS DONE & HOW WELL)	EVALUATION
EXAMPLE: 19860201	First Day of Class: Overview of Course Outline; Introductions to Other Students; Discussion re Work Study Week, etc.	Understand what is needed for the course: 1. Large 3-ring binder 2. Two diskettes for 630 typewriter 3. Must self-evaluate on a daily basis 4. Attitude; initiative; quality and quantity of work is extremely important 5. Attendance and punctuality are extremely important, etc.	NO TESTS TODAY Self-evaluation averaged 20/25 today. (If I had a test I would have recorded it here e.g., Concepts 89%)
19860104			

Teacher's Observation of Student's Daily Performance

(Place a checkmark in column for each item each day if a 5. An X if less than average, e.g., 2 or 1.)

Student	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE	ATTITUDE	AMOUNT OF WORK	INITIATIVE	QUALITY OF WORK	ATTENDANCE

Daily "Time Clock" Record

DATE ______________________

STUDENT	TIME IN	TIME OUT	TIME MISSED	TOTAL PROD. MINUTES	TOTAL *ULP	CHECKED INITIALS

*Useable lines produced.

E M P L O Y E E   A T T E N D A N C E   R E C O R D

NAME ______________________________ DEPARTMENT ______________
LAST FIRST MIDDLE

DATE OF BIRTH ______________ DATE OF HIRE ______________ CLOCK NUMBER ______________

SOCIAL INSURANCE NUMBER ______________ SICK DAYS DUE ______________ VACATION TIME DUE ______________

19____

																																ABSENCE SUMMARY										
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31											
JAN																																										
FEB																																										
MAR																																										
APR																																										
MAY																																										
JUN																																										
JUL																																										
AUG																																										
SEP																																										
OCT																																										
NOV																																										
DEC																																										

YEARLY TOTALS
Use Reverse Side
for Additional Notes

DA Dental Appointment
DI Disability
DF Death in Family
FT Field Trip

MA Medical Appointment
PP Parents' Permission
SF Sickness in Family
SS Sickness, Self

XD Excused Other
X Unexcused
V Vacation

LEARNING RESOURCES

A number of the learning resources listed in this section have not been evaluated by Alberta Education for tolerance and understanding. Their listing is not to be construed as explicit or implicit departmental approval for use. These titles are provided as a service only to assist teachers to identify potentially useful support materials for the topics. The responsibility to evaluate these resources prior to use with students rests with the local jurisdiction. The resources designated as BASIC and RECOMMENDED (starred) have Alberta Education evaluation criteria.

LEARNING RESOURCES

Approved Resources:

The following resources have been approved by Alberta Education. Refer to the curriculum guide for correlation of these resources to the topics included in the modules.

BASIC RESOURCE

Luke/Striegler. Office Systems and Procedures. Markham, Ontario: Houghton Mifflin Canada Ltd., 1984. (BASIC)

Teacher's Manual (Recommended)
Student Activity Book (Recommended)

RECOMMENDED RESOURCES

Atkinson. Medical Office Practice. (Modules 8-10) (3rd Edition) Southwestern, 1984.

Instructor's Guide

Atkinson. Typewriting Office Practice - Top Music. (Modules 8-10) (2nd Edition) Gage, 1982.

Teacher's Manual

Attridge. Projects to Accompany Contemporary Office Procedures. McGraw-Hill, 1984.

The Canadian Secretary's Handbook. (2nd Edition) Don Mills, Ontario: Collier MacMillan, 1983.

Dallas Oil, Inc. (Modules 8-10) Southwestern, 1985.

Teacher's Manual

Matthews. Palmetto Insurance Company - The Word Processing Correspondence Secretary: An Office Job Simulation. (Modules 8-10) Southwestern, 1981.

Employer's Manual

McIntosh. Westchester Square Inc. - The Secretary: An Office Job Simulation. (2nd Edition) Southwestern, 1983.

Employer's Manual

Reynolds. Snow Country Typewriting Practice Set. (Modules 8-10) Gage, 1980. (Canadian Edition)

Manual

Smith, M.D., and Laker, Eileen. Canadian Filing Practice. (2nd Edition) Toronto, Ontario: Copp Clark Pitman, 1978.

Smith, Pat; Hay-Ellis, Pam; and McConnell, Margaret. Pitman Office Handbook. Toronto, Ontario: Copp Clark Pitman, 1982.

Activity Guide

Other Resources

These resources have not been evaluated by Alberta Education. Titles are provided as a service to assist teachers to identify useful support materials. The responsibility to evaluate these resources rests with the local jurisdiction.

Aid Services of Edmonton. Aid Directory. Edmonton: Community Services for Edmonton and District, 1984.

Aitken, Ian; Coleman, June; and Laker, Eileen. Rough to Ready: Formatting From Rough Draft. Toronto: Copp Clark Pitman Ltd., 1984.

Atwood, Illa W. Teaching Office Procedures Today. Portland, Maine: J. Weston Walch.

Berezowsky, Joyce. Organizing Business Meetings, A Practical Guide to Arranging and Recording Business Meetings. Edmonton: Falken Publishing, 1983.

Bolles, Richard. What Colour Is Your Parachute? Berkeley, California: Ten Speed Press, 1982.

Camp, Sue C. Developing Proofreading Skills. New York, N.Y.: McGraw Hill, 1980.

Dostal, June. Office Etiquette, (Information Exercises and Case Studies). Portland, Maine: J. Weston Walch, 1980.

Ellis, Bettie Hampton. Word Processing Concepts and Applications. New York, N.Y.: McGraw Hill, 1980.

Figler, Howard. The Complete Job Search Handbook. New York, N.Y.: Holt, Rinehart and Winston, 1979.

Ion, Sam. Dear Sam: Advice to the Working Woman. New York, N.Y.: Personal Library Publishers, 1980.

Jackson, Tom. Guerilla Tactics in the Job Market. New York, N.Y.: Bantam Books, 1978.

Kisiel, Marie. Career Strategies for Secretaries. Chicago, Ill.: Contemporary Books, 1982.

Kruse, Heringer, Lawry. Proofreading (Text and Workbook). Cambridge, Ontario: Collier MacMillan, 1983.

Levinson, Conrad. Earning Money Without a Job. New York, N.Y.: Holt, Rinehart, and Winston, 1979.

Mason, Louis D. Human Relations at the Office. Portland, Maine: J. Weston Walch (Case Studies), 1973.

McCauley, Rosemarie. On the Job: Modern Office Simulations. 2 Volumes. Toronto, Ontario: Copp Clark Pitman Ltd., 1984.

Montaperto, Nicki. The Freelancer's Career Book. New York, N.Y.: Arco Publishing, 1983.

Moon, Harry. Office Procedures. Bronx, New York: Milady, 1984.

Pansegraw, Morag. Business Filing Procedures. Agincourt, Ontario: Gage, 1982.

Popyk, Marilyn. Word Processing Essential Concepts. New York, N.Y.: McGraw Hill, 1983.

Sparling, Allan E. Complete Course in Office Procedures, Fifth Edition. Scarborough, Ontario: McGraw Hill, 1982.

Stewart, Marie M; Lanham, Frank W; and Zimmer, Kenneth. Business English and Communication-Second Canadian Edition. Scarborough, Ontario: McGraw Hill, 1977.

Tarnai, Lois. The Canadian Office Today. Toronto, Ontario: John Wiley & Sons, 1982.

Walker & Preece. Word Processing Applications. Toronto, Ontario: Copp Clark Pitman, 1984.

Resources Available from Government Departments

Administrative Management Society. Modern Office Technology

Alberta Tourism and Small Business. Small Business Quarterly. Edmonton, Alberta, available from Alberta Tourism and Small Business.

Canadian Mental Health Association. Unemployment: Impact on Body and Soul. Toronto, Ontario: Canadian Mental Health Association, 1983.

Employment and Immigration Canada. Moving On: To a Career, To a Job, By Staying On. Ottawa, Ontario: Employment and Immigration Canada.

Appendices

Appendix A

EXAMPLE LESSON PLAN

Topic:	Filing on Film
Teacher Aims:	Students will be able to understand reasons for using microforms.
Objectives:	Students will be able to list the basic equipment necessary for making microfilm, list five types of microforms, state five advantages of filing on film.
Goals for the Day:	(Here, teacher objectives may be written in a form which students will understand more clearly.)

Priority	Activity	Time
1	Class organization, attendance, etc.	
2	Reference to previous lessons -- filing papers.	5 min.
3	Attention grabber -- Take an instant picture of a person in the class. This illustrates that information can be captured on film, reducing the amount of storage space necessary. Which is larger, the person or the picture of the person?	5 min.
1	Lesson goal -- reason for filing on film.	15 min.
	Methods for storing information on film.	10 min.
	Illustration of information (slides showing types of equipment and microforms prepared by teacher or class from resources obtained from suppliers of microforms).	
2	Review of information.	5 min.

*Basic Form as recommended.

Priority	Activity	Time
2	Student group activity. In this activity, students are to compare and contrast the storing of materials on film and on paper. One group presents the case for paper storage, the other group presents the case for filing on film.	15 min.
3	Begin home assignment. This consists of the words on page 176 in the Business Terminology Bank which have to do with micro-photography, micrographics, microforms and all other words pertaining to this particular topic, and the reading of pages 168-170 in the text.	5 min.
	Total:	1 hour

Home assignment: Read the pages noted above and complete Questions 1-5 in the Self-Check on Your Reading on page 175. (Due next day.)

Resources:

Text sections: Stated above.
A-V aids: Slide set on microfilming.
Other:

Equipment necessary: Instant camera with flash, slide projector and screen.

Lesson evaluation:

	Yes	No
use again	☐	☐

Appendix B

DETAILED EXAMPLE OF AN ORAL REPORT

PROCEDURE	- BACKGROUND Why are oral skills necessary? - What is an oral report? - What factors contribute to a successful presentation? - How to prepare ahead. - How to handle the actual presentation.
BACKGROUND	
Changing work environment	- Basically manufacturing goods (men).
(women stayed in the home)	- Automation of industry produced MORE GOODS.
(Women started to go out to work - short term employment 1950's)	- Required more "services" to cope with the distribution of more goods (women) (50% of work force).
ELECTRONIC REVOLUTION	- Office production speeded up; routine tasks eliminated; need for more sophisticated skills in order to survive in business world.
(Women NEED to plan lifetime careers -- single; single families; divorced; widowed, etc.)	- Need to prepare for a career that is interesting and challenging because women could have to work the rest of their lives.
ORAL COMMUNICATIONS	- One area that needs development in order to climb the corporate ladder. - Business society demands effective communications. both ORAL & WRITTEN
Study done recently	Fortune 500 (big corporations based in California). STATED: More emphasis in education must be placed on ORAL COMMUNICATIONS DEVELOPMENT.

Selecting a topic

- Consider your audience:
  - What level of language would they best understand?
  - What would interest them?
  - What could be developed to improve the appeal of your topic?
  - What impression of the topic and yourself do you wish to make?
  - What tone do you wish to create:
    SERIOUS?
    INFORMAL?
    CONCERNED?

Because the main purpose of an oral report is to inform, it is important to organize the talk.

One method of organizing an oral report is to break it down as follows:

INTRODUCTION

- Prepares the listeners for the rest of the talk.

THE REPORT

- What the speech is about:
  = give background (helps listeners understand the next part)

  = give evidence (gives information about what has been or can be done)

  = give analysis and explanations (tells the listeners the significance of what is being done)

THE SUMMARY

- Reviews the entire talk.

CONCLUDING REMARKS

- Brief comments to give listeners the impression that the speaker liked speaking to them or enjoyed being with them.

Make your report understandable **BUT** always **BE YOURSELF.**

Make accurate, detailed notes or draft a complete speech before the date of your talk; then when you deliver it **YOU** do it, do not try to act like someone else.

MAKE NOTES then

EDIT	- Mark items that should be improved, amplified, deleted, changed or reworded, to suit the effect and the audience you want to achieve.
BLUE PENCIL/HIGHLIGHT	- Xerox material that you want to use and cross out (blue pencil) unimportant information **OR** highlight the important points.
BLOCK & ANNOTATE for changes	- Put special emphasis words and phrases in large letters; underscore; boldface; place in special place on page, etc.
NOTES ON NOTES	- Once speech is prepared, reduce it to short notes - use cards, notepad, or regular sized paper, whatever you are comfortable with - but reduce the notes so that you can present, not **READ.**
KEY	- **Make sure you key your cards so they can't GET OUT OF ORDER.**
STAGE MANAGE	- REHEARSE, using notes on cards, number them, give the presentation and tape it; play back the tape, pencil in hand, and make notes and changes.
	- Make note of any rough spots.
	- Note where you want to pause.
	- Code optional parts.
REHEARSE	- (Tape and play back) Pencil in hand, note things that occur during the practice. This will keep the speech from "going cold" on you by keeping you interested in both the content and the impression you hope to make with it.
	- REMEMBER you **CAN** change your delivery and the speech as you are delivering it.

- Be familiar with the content, but do not allow it to become rigid; be flexible -- go with the flow -- if interest is stimulated in a particular comment don't be afraid to pursue it. (Your cue cards will help you to get back on track so you cover everything you planned to cover.)

DELIVERY

- Planning and preparation - relaxed and confident delivery of your oral report.
- Also, the speech will tell your audience you cared enough about them to consider the topic carefully and tailor it to them.
- If you know the topic and decide to present it without proper pre-thinking, you are likely to become flustered while making the speech.

Even if you never look at your notes during your talk, they will have served their purpose and the speech will be better for the work you have done.

ACCEPTANCE

- Speaker can influence how well her report will be accepted by her listeners by being careful with GRAMMAR: WORD SELECTION and PRONUNCIATION, as well as

dress and posture
hand movements and gestures
facial expressions
sound of the speaker's voice
rate of speaking (not too fast, not too slow)
general appearance and mannerisms
speaker's attitude toward what he or she is saying
speaker's attitude toward the listeners

Material must be presented in such a way that it is easily understood immediately upon presentation - as opposed to the advantage of a written communication, which, if not understood the first time, can be reread at a slower pace.

ACCEPTANCE	- To help listeners understand quickly, a speaker should: **SPEAK LOUDLY** (so that **ALL** can hear). **PAUSE** now and then (to impress upon the listeners what has been said). **USE WORDS AND EXPRESSIONS** that are best understood by the group you are speaking to--unfamiliar words and terms confuse the listeners. **SUM UP** each major part of your report before going on to the next part. **AT THE END OF THE REPORT**, give a brief summary of the entire report.
SUMMARY AND CONCLUDING REMARKS	- **NEED** to develop **ORAL** communication skills in order to progress up to management levels in a career of their own choice. - One method of developing these skills is to start making oral presentations and to communicate orally as much as possible (as opposed to sitting in class all day listening, and then writing and typing reports). - Presentations have to: - centre on a carefully selected topic. - present material carefully researched. - have a speech prepared; edited; reduced to key notes, for speaking as opposed to reading.

(if possible, use visual aids, handouts, speakers, etc., to assist you in making a clear, understandable presentation)

- be rehearsed and notes made as to what to emphasize, when to go slow or pause, when to ask if further clarification is required.
- always be in "contact" with each member of the group -- eye contact.
- be yourself - but be aware of expressions, grammar, pronunciation, gestures, facial expressions and mannerisms, etc.
- **GET FEEDBACK** - end your presentation with an exercise that will let you know that the material was understood -- e.g., **QUESTION PERIOD** or **QUIZ**.

WRAP-UP ACTIVITIES

- Run through the two-page evaluation; have students evaluate presentation on each item.

Then give them the single page evaluation sheet that we will be using to evaluate them so they can see it. Go over it with them, and suggest that they FILL IT OUT FOR THEMSELVES WHEN REHEARSING.

PARTICIPANTS WILL BE ASKED TO FILL OUT FORMS LIKE THIS AT THE END OF EACH PRESENTATION; MARKS WILL BE ADDED UP, AVERAGED AND GIVEN TO THE "PRESENTER" as the grade for the presentation.

Any problem areas noted will be discussed with the speaker, privately.

THANK YOU - for being such co-operative listeners!!

Appendix C

TRANSCRIPTION EVALUATION FORM

NAME ______________________________

DATE ______________________________

CLASS _____________________________

Your transcription has been recorded, or is being returned because it contains one or more of the following errors:

____ misspelled word or name

____ material omitted or words that would change meaning

____ strike-overs

____ careless erasures or corrections

____ smudge marks

____ errors in figures

____ omitted or incorrect punctuation

____ unacceptable word division

____ improper word choice

____ inappropriate or omitted notation marks such as reference initials, enclosure notations, etc.

____ unacceptable format or style

____ Other ___________________________

____

____ RESUBMIT ____ FILE

PROOFREADER: ____________________

EXERCISE INFORMATION

Page No. _____ Exercise No. _____

Text/Simulation/Kit Name:

____

GRADE POINTS: ____ # OF ULPS: ____

RECORDED: _____ NOT RECORDED: ____

Mailable - 5
Correctable - 3

Not Mailable - 0

TRANSCRIPTION EVALUATION FORM

NAME ______________________________

DATE ______________________________

CLASS _____________________________

Your transcription has been recorded, or is being returned because it contains one or more of the following errors:

____ misspelled word or name

____ material omitted or words that would change meaning

____ strike-overs

____ careless erasures or corrections

____ smudge marks

____ errors in figures

____ omitted or incorrect punctuation

____ unacceptable word division

____ improper word choice

____ inappropriate or omitted notation marks such as reference initials, enclosure notations, etc.

____ unacceptable format or style

____ Other ___________________________

____

____ RESUBMIT ____ FILE

PROOFREADER: ____________________

EXERCISE INFORMATION

Page No. _____ Exercise No. ____

Text/Simulation/Kit Name:

____

GRADE POINTS: ____ # OF ULPS:____

RECORDED: ____ NOT RECORDED: ____

Appendix D

A GET-ACQUAINTED ACTIVITY

Have students meeting the descriptions listed below, sign his/her name.

1. Person who has the same month of birth as you ____________________
2. Ten (10) points extra if your birthdays are on the same day __________
3. Person born out of the province ____________________
4. Person with initials that spell a word ____________________
5. Person with a friendly smile ____________________
6. Person whose last name could be a first name ____________________
7. Person with a hearty laugh ____________________
8. Person who is left-handed ____________________
9. Person wearing something over ten years old ____________________
10. Person wearing something brand new ____________________
11. Person with dimple(s) ____________________
12. Person who plays a guitar ____________________
13. Person with a most unusual hobby ____________________
14. Person who is the same height as you ____________________
15. Person who has taken a trip out of Canada ____________________
16. Person with same color eyes ____________________

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Office procedures 20-30
teacher's manual. -

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For Reference

NOT TO BE TAKEN FROM THIS ROOM

EXCEPT W[illegible]